

## **DocKIT for SharePoint 2007 v2.x User Manual**

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# USER'S MANUAL

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## ***Introduction***

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**Document Import Kit for SharePoint 2007 (DockIT)** is a powerful, easy-to-use tool to import documents and their associated metadata from file systems & network shares into Microsoft Office SharePoint Server 2007 (MOSS 2007) and Microsoft Windows SharePoint Services v3.0 (WSS v3.0).

DockIT software has been designed and developed to address the specific needs of companies that are deploying Microsoft Office SharePoint Servers / Windows SharePoint Services. DockIT for SharePoint 2007 assists users in importing their existing documents and file repositories into Microsoft Office SharePoint Server 2007 / Windows SharePoint Services v3.0.

The functional benefits of using DockIT for SharePoint 2007 include:

- Provides a simple solution to import documents and its associated document properties into SharePoint libraries
- Imports documents from different file server and network shares locations into SharePoint libraries
- Associates the metadata stored in a CSV / Excel / TXT file to the respective documents in SharePoint
- Associates documents' summary properties of source documents namely - Title, Subject, Author, Category, Keywords and Comments to the respective documents in SharePoint
- Imports Manager and Company document properties in the case of MS-Office documents. Automatically propagates Microsoft Office custom document properties.
- Propagates the original Created Date, Last Modified Date, Created By and Modified By fields to the equivalent system fields in SharePoint for each folder / document available in the source location



**Note:** DockIT Web Services component must be installed in the SharePoint Server to activate this feature

- Assigns Content Approval Status and related Comments for each folder and document
- Renames invalid source folder & file names based on naming rules specified by user when importing them in bulk to a SharePoint library
- Filter documents based on certain document property conditions prior to import
- Validates task settings to minimize errors during a live transfer

- Re-imports folders / files that failed during the first attempt
- Runs the import task through command-line or Windows Task Scheduler interface

## **DockIT Web Services**

*DockIT Web Services* component has been designed and developed to address the specific needs of users who desire to import documents' System Dates (Created Date and Last Modified Date), System Users (Created By and Modified By) and Content Approval (Approved, Pending and Draft) from original source to the Microsoft Office SharePoint Server (MOSS 2007) / Windows SharePoint Services v3.0 (WSS v3.0) site libraries. The functional benefits of using DockIT Web Services for SharePoint 2007 include:

- Enables users to update System Dates (Created Date and Last Modified Date), System Users (Created By and Modified By) and Content Approval (Approved, Pending and Draft) of folders / files by running DockIT for SharePoint 2007 application in a remote computer / user desktop, instead of running DockIT application in the destination SharePoint server.
- Enables users to update the system fields regardless of the platform architecture (32-bit or 64-bit platform).
- Integrates seamlessly with DockIT application

## ***1) DockIT for SharePoint 2007 Installation Requirements***

---

**Hardware:** Intel Pentium processor, 512 MB of RAM, 4 MB disk space to install DockIT

**Software:** Windows XP (or) Windows Vista (or) Windows Server 2003 with the latest service packs and .NET Framework 2.0 or higher

Microsoft Office 2007 Suite or [Microsoft Office 2007 Compatibility Pack](#) (required when importing Office 2007 format based file properties)

**Installation Instructions** Once you download the software, install applications packages (.msi) depending on your import requirements. The simple setup wizard will guide you through the installation process.

- **DockIT2007.msi** in order to install DockIT for SharePoint 2007 application. You can use this setup file to install DockIT application in the SharePoint Server or any client machine running Windows XP or Windows Vista (32-bit or 64-bit platforms).
- **DockIT2007\_WebServices\_x86.msi** in order to install DockIT Web Services component for 32-bit Windows 2003 Server. You can use this setup file to install DockIT Web Services component in 32-bit Windows Server 2003 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0, in order to propagate the Created Date, Last Modified Date, Created By, Modified By, Content Approval Status & Comments fields from the source documents.
- **DockIT2007\_WebServices\_x64.msi** in order to install DockIT Web Services component for 64-bit Windows 2003 Server. You can use this setup file to install DockIT Web Services component in 64-bit Windows Server 2003 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0, in order to propagate the Created Date, Last Modified Date, Created By, Modified By, Content Approval Status & Comments fields from the source documents.

**IMPORTANT:** You do not have to install DockIT Web Services component (DockIT2007\_WebServices\_x86.msi or DockIT2007\_WebServices\_x64.msi), if you do not wish to propagate the Created Date, Last Modified Date, Created By, Modified By, Content Approval Status & Comments fields from the source documents to a SharePoint library.

## ***2) DockIT for SharePoint 2007 Installation Option***

---

DockIT for SharePoint 2007 can be installed either from the installation file available on your hard disk, or you can download the latest installation file from website ([www.vyapin.com](http://www.vyapin.com)).

Before you start installing DockIT, we strongly recommend that you visit the website to check for a new installation file. This way you can be sure to install the latest available version of DockIT for SharePoint 2007.

DockIT for SharePoint 2007 (DockIT) product's evaluation version has the 15-day limit and the 100 items import limit, whichever comes first.

The sales number can be found on << <http://www.vyapin.com/contactus.htm> >>. If you purchased your copy of DockIT on-line, your license key will have been delivered to you via e-mail.



### ***3) DocKIT for SharePoint 2007 Installation Process (Client)***

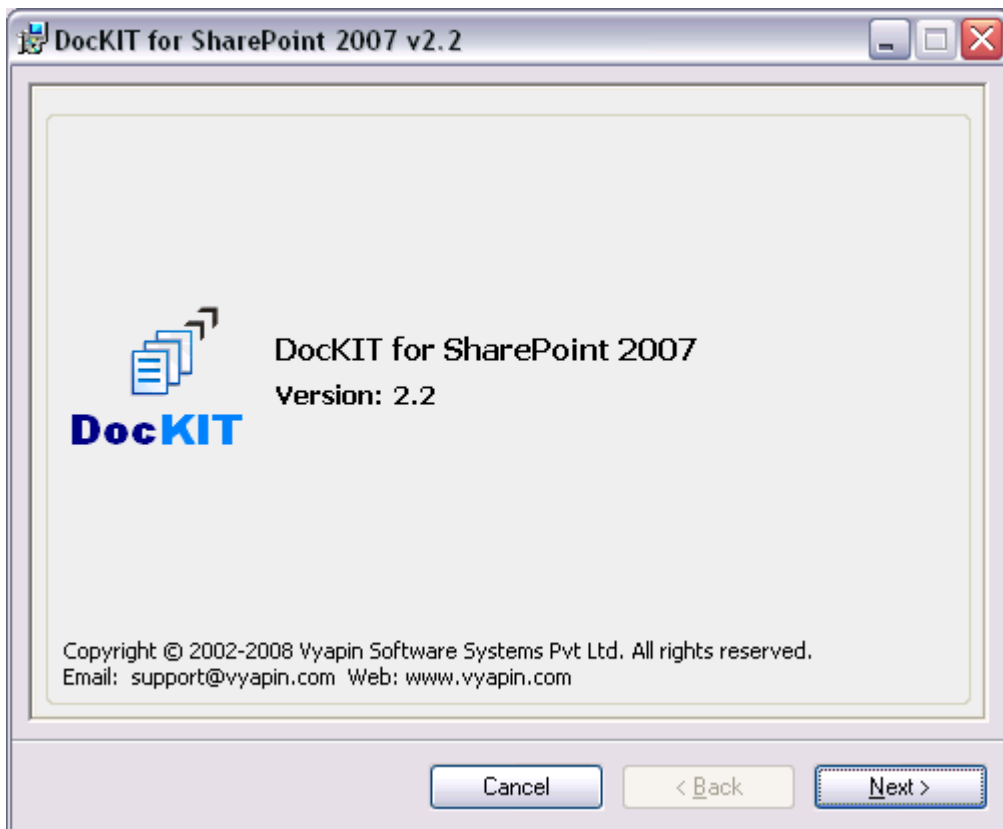
---

To install DocKIT for SharePoint 2007 on your computer, you need to get the latest installation file. We recommended getting the latest installation file online. You can download the file from the website (<http://www.vyapin.com>) / Downloads section.

Once you have downloaded and saved the installation file on your hard disk, you can launch the installation process. The installation is a sequence of dialog windows with a brief description of what do at each step. In the following, we offer an explanation for each dialog window:

#### **3.1. Installation Launch**

---

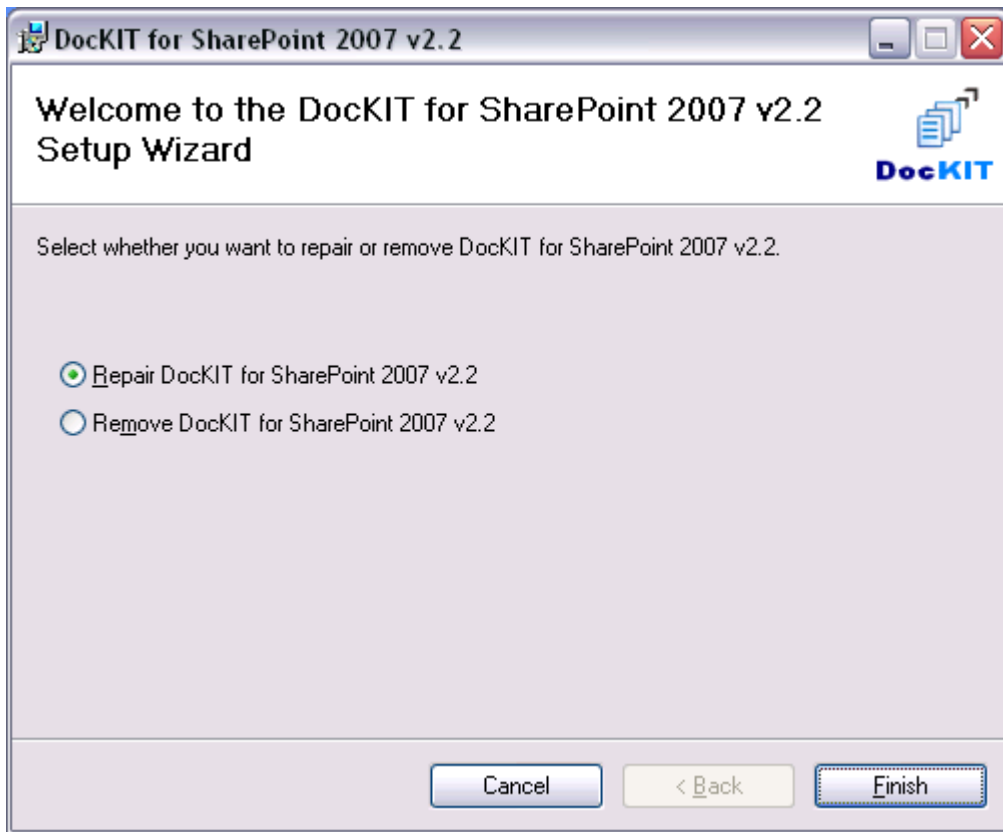


The installation process starts with the DocKIT for SharePoint 2007 Logo.

Press the {**Next**} button to continue the installation process.

### 3.2. Select Installation Type

---

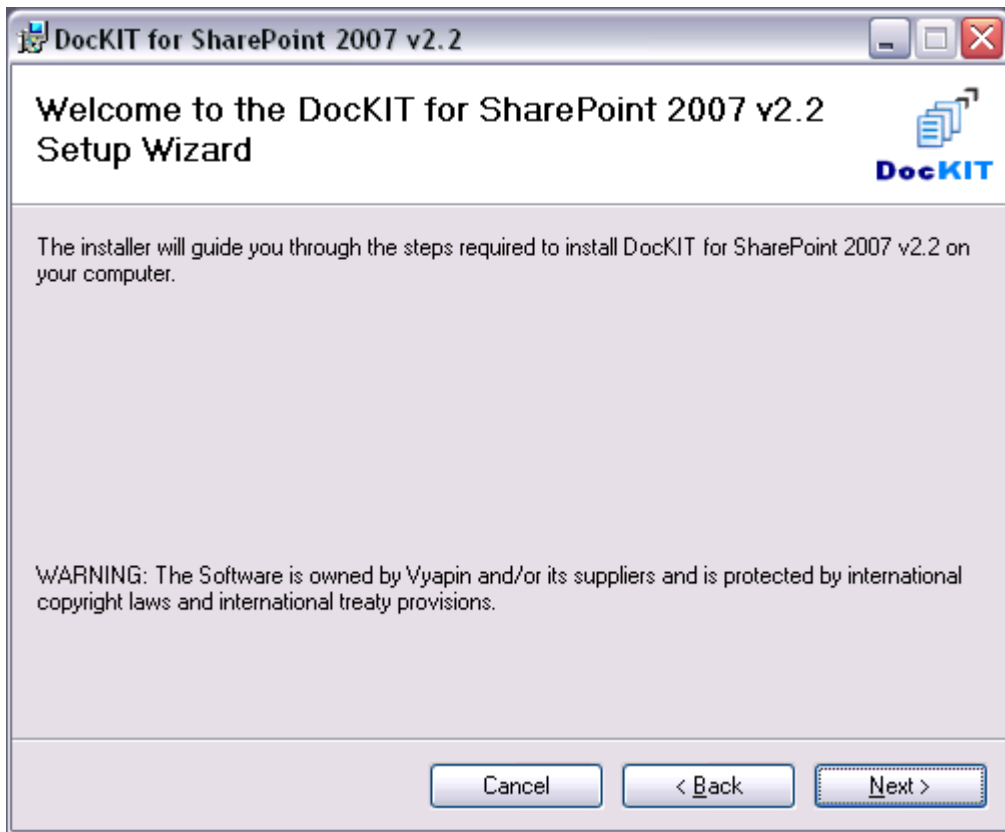


If you have older version of DocKIT for SharePoint 2007, it prompts whether you need to repair DocKIT for SharePoint 2007 or presently remove the application from the hard disk where DocKIT for SharePoint 2007 was installed.

It is requested to remove the installed version from the hard disk and install new version (downloaded version).

### 3.3. Welcome Screen

---

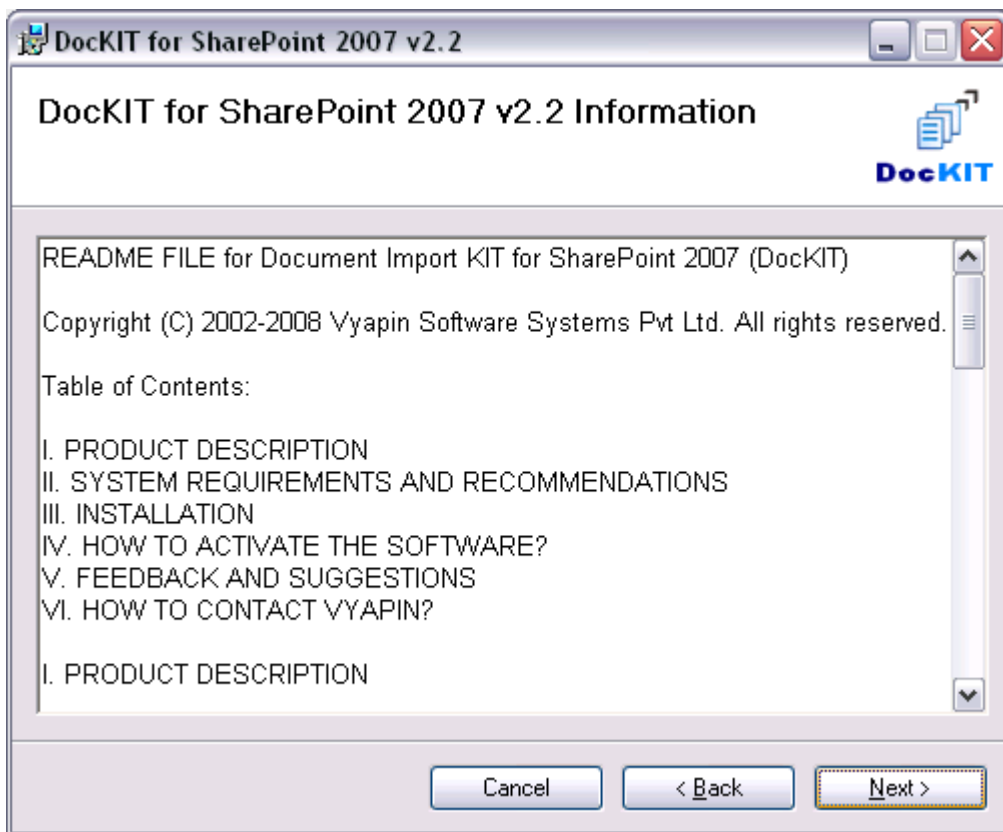


The Welcome screen will be displayed, now press next button to proceed. You will be prompt to the readme file.

Press the **{Next}** button to continue the installation process.

### 3.4. Readme Screen

---

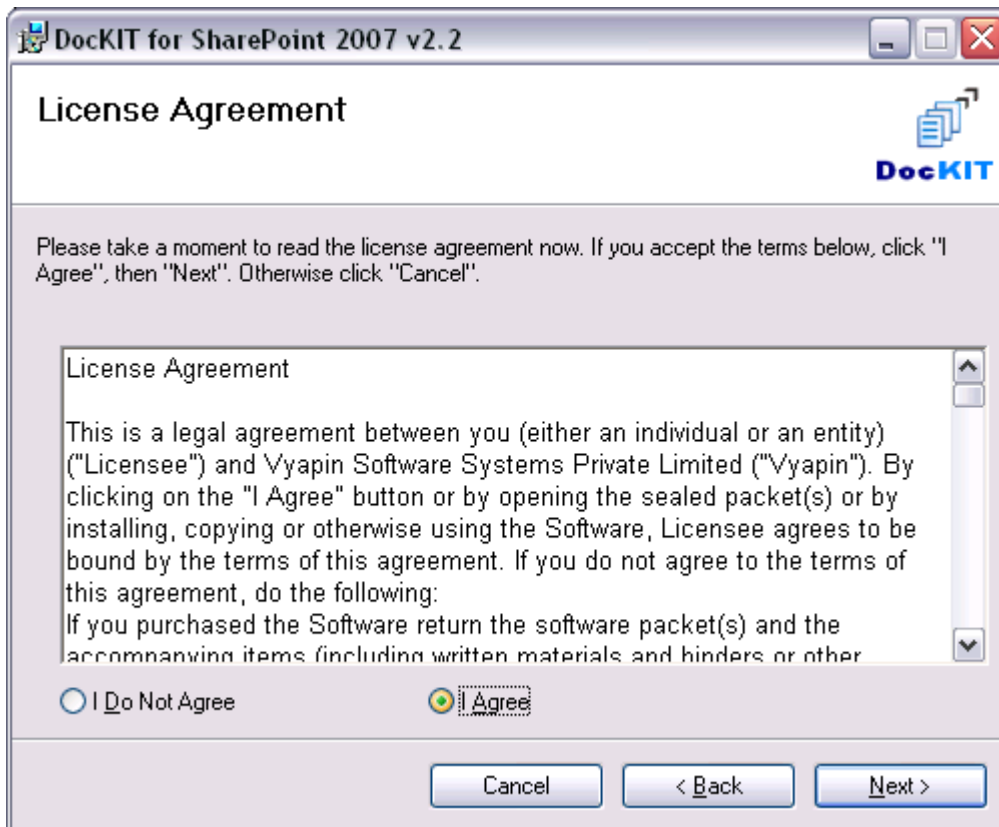


Press the **{Next}** button to continue the installation process.

### 3.5. License Agreement

---

The License Agreement dialog provides the full wording of the DockIT license agreement. Please read it carefully and confirm that you have read, understood and accept the agreement by pressing the I Agree button. If you do not agree with the license agreement press the I Do Not Agree button, and the installation process will be terminated immediately.

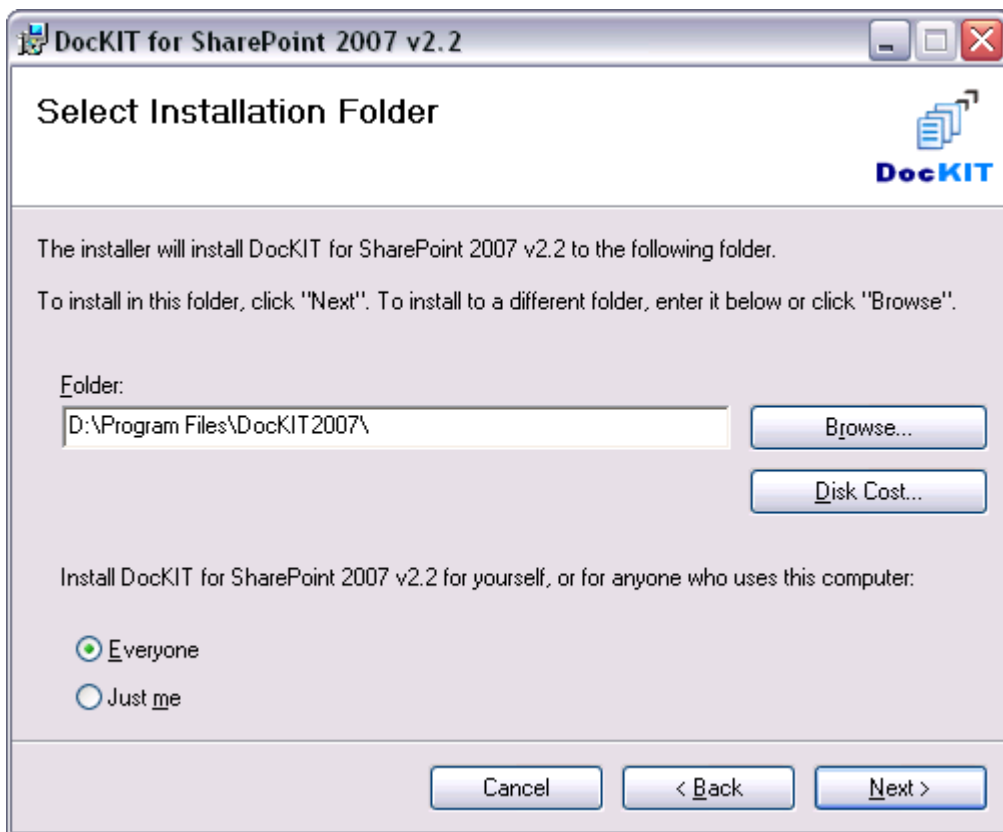


Having confirmed the license agreement you will be redirected to the location where DockIT for SharePoint 2007 to be installation.

Press the **{Next}** button to continue the installation process.

### 3.6. Installation - Destination Folder

---

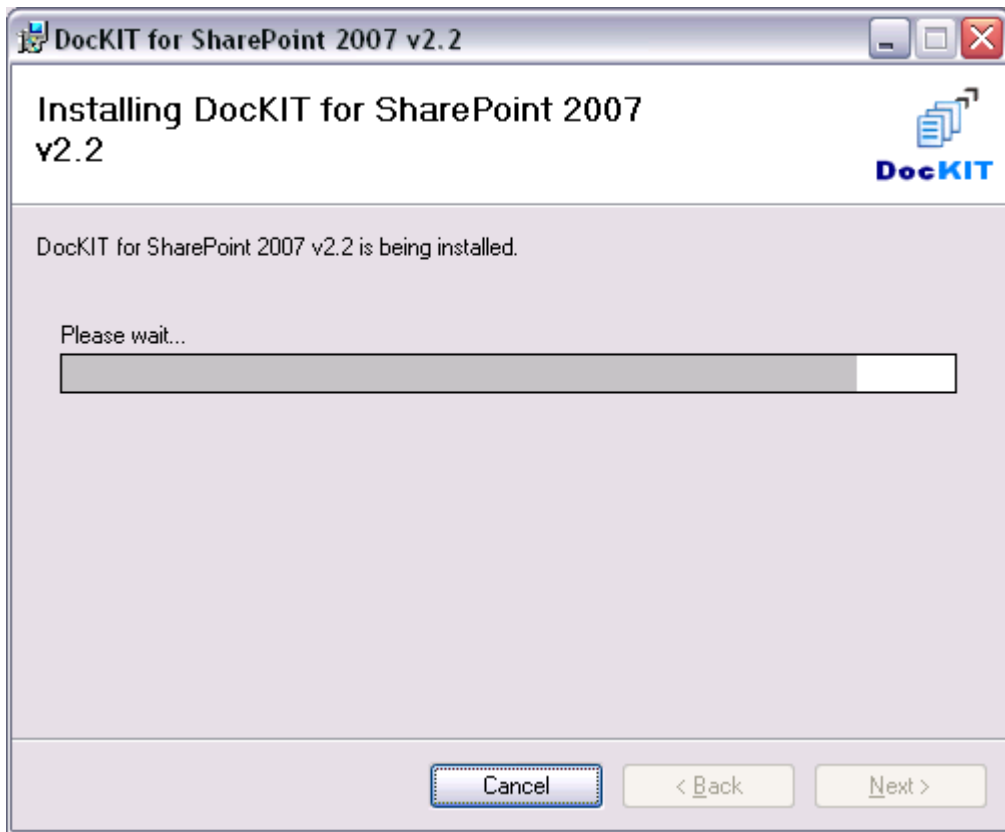


The Destination folder dialog allows you to specify the location where DocKIT should be installed. By default, DocKIT will be installed to the program files folder located on drive C:\. If you want to change this location, use the Browse button to display the drive structure, and select the respective folder. Press the Next button to confirm.

Press the **{Next}** button to continue the installation process.

### 3.7. Installation Progress

---



DocKIT for SharePoint 2007 will now be installed in your Hard Disk.

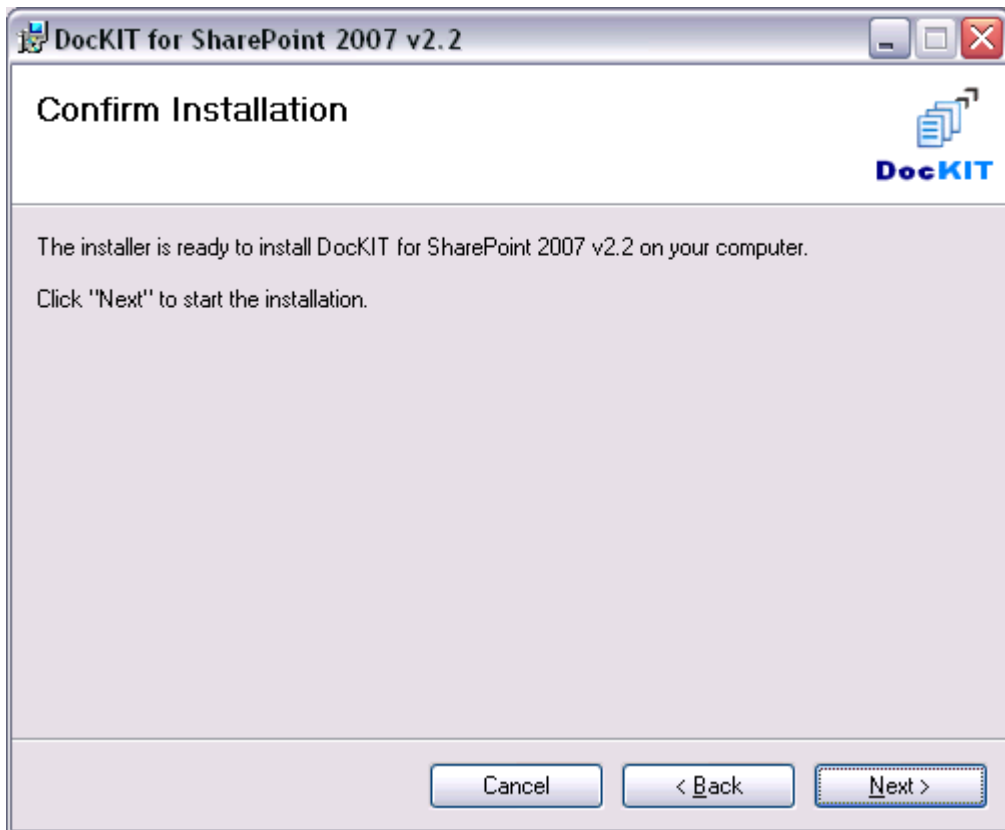
Once the installation is successfully completed you will be prompt to the next screen.

### 3.8. Installation Complete

---

The Installation Complete dialog is the last step of the DockIT for SharePoint 2007 installation process.

DockIT for SharePoint 2007 is now installed on your computer and fully functional.





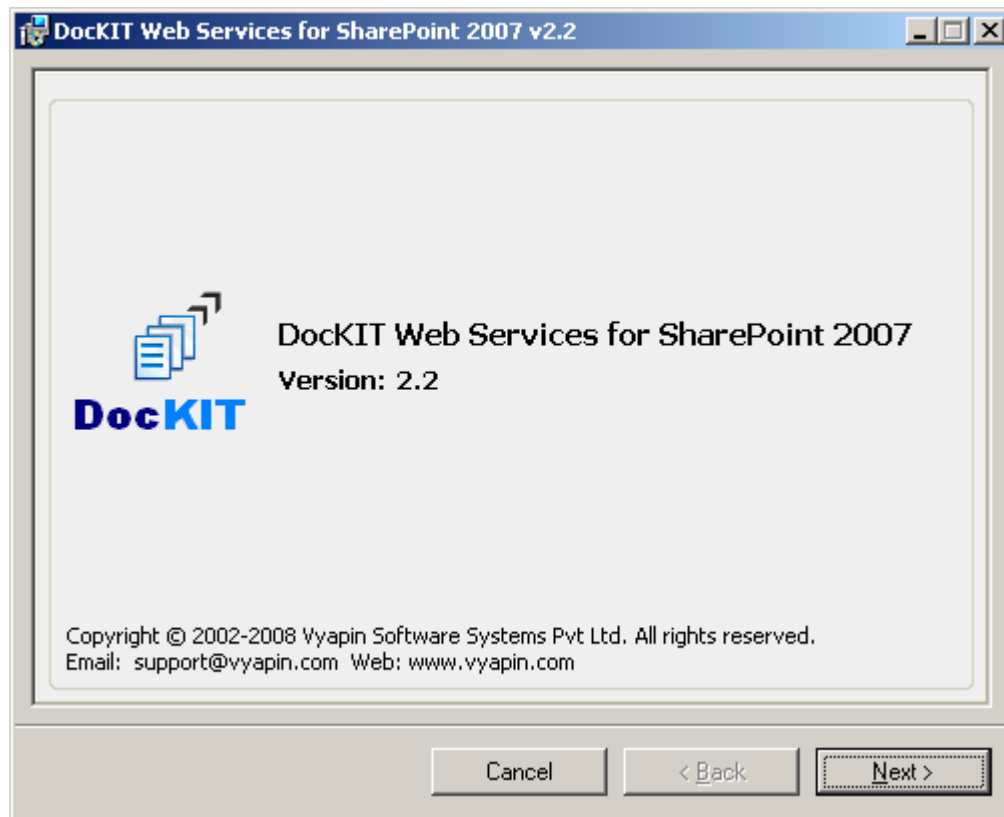
#### **4) DocKIT Web Service Installation Process**

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In order to propagate the Created Date, Last Modified Date, Created By, Modified By, Content Approval Status & Comments fields from the source documents.

##### **4.1. Installation Launch**

---

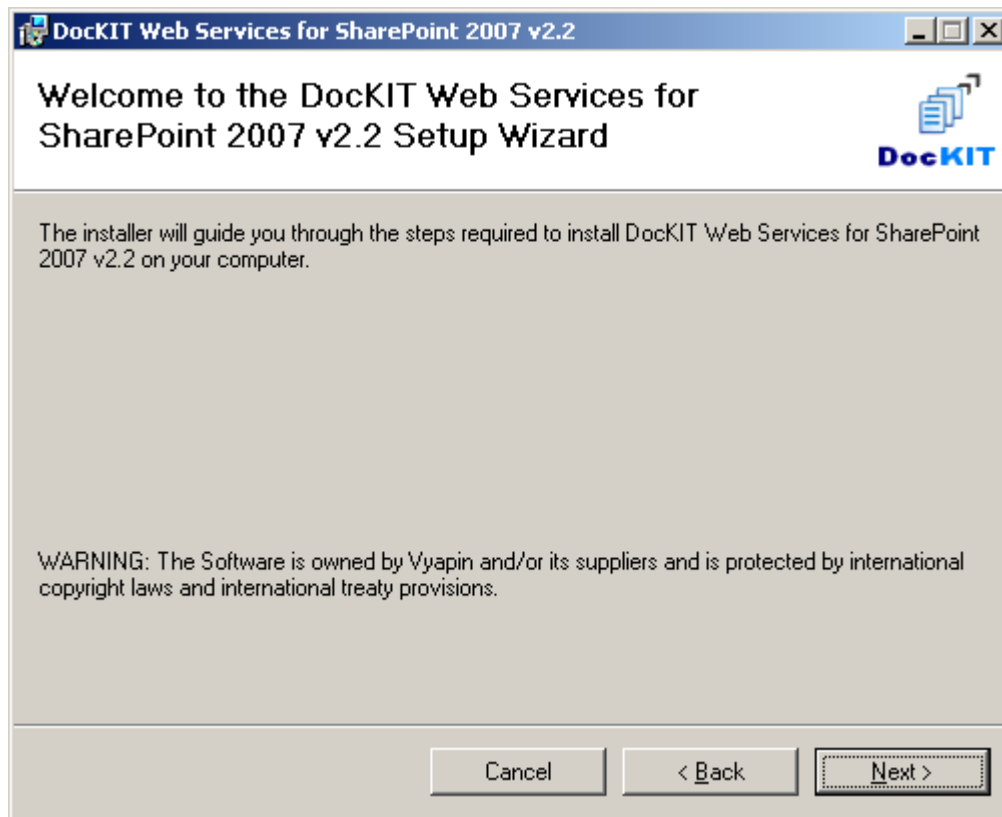


The installation process starts with the DocKIT Web Services for SharePoint 2007 Logo.

Press the {**Next**} button to continue the installation process.

## 4.2. Welcome Screen

---

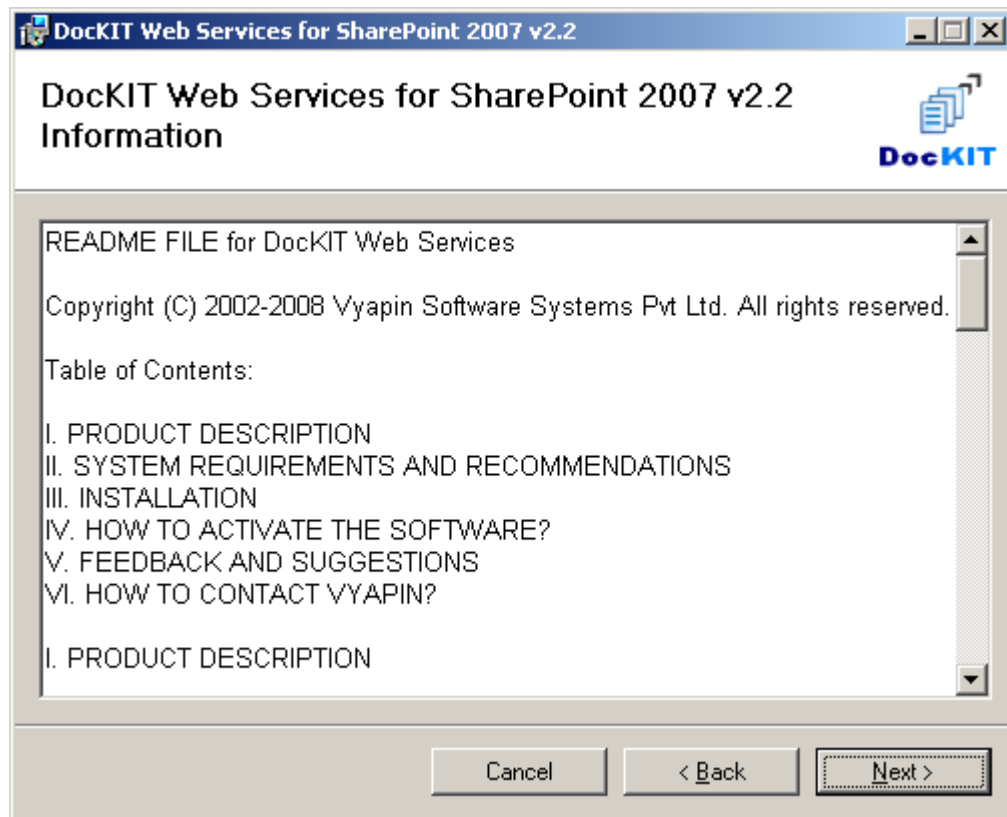


The Welcome screen will be displayed, now press next button to proceed. You will be prompt to the readme file.

Press the **{Next}** button to continue the installation process.

### 4.3. Readme Screen

---



Press the **{Next}** button to continue the installation process.

#### 4.4. License Agreement

---

The License Agreement dialog provides the full wording of the DockIT Web Services license agreement. Please read it carefully and confirm that you have read, understood and accept the agreement by pressing the I Agree button. If you do not agree with the license agreement press the I Do Not Agree button, and the installation process will be terminated immediately.

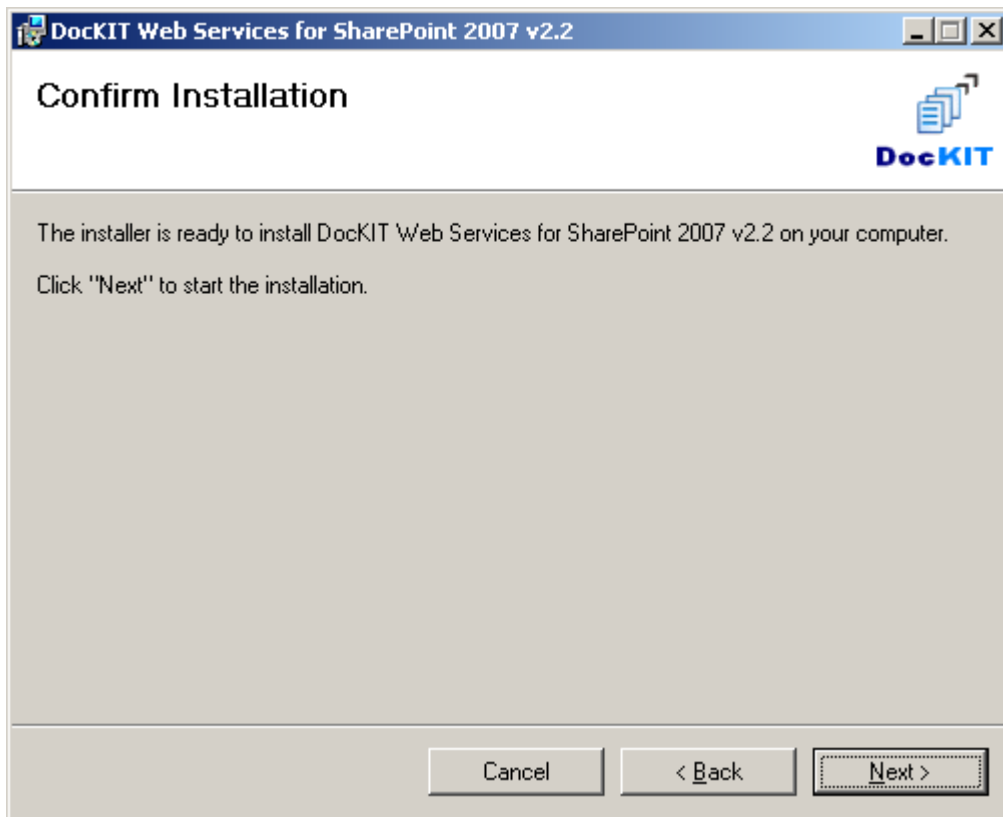


Having confirmed the license agreement you will be redirected to the location where DockIT Web Services for SharePoint 2007 to be installation.

Press the **{Next}** button to continue the installation process.

## 4.5. Installation Confirmation

---



DocKIT Web Services for SharePoint 2007 will now be installed in your Hard Disk.

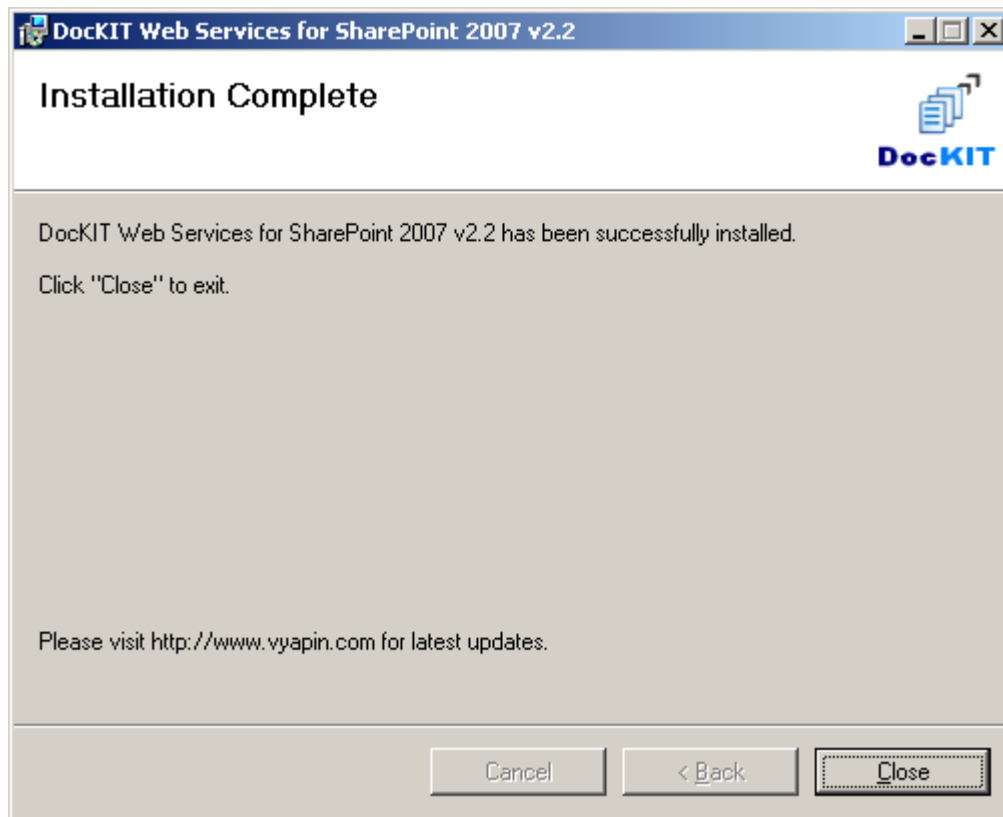
Once the installation is successfully completed you will be prompt to the next screen.

## 4.6. Installation Complete

---

The Installation Complete dialog is the last step of the DockIT Web Services for SharePoint 2007.

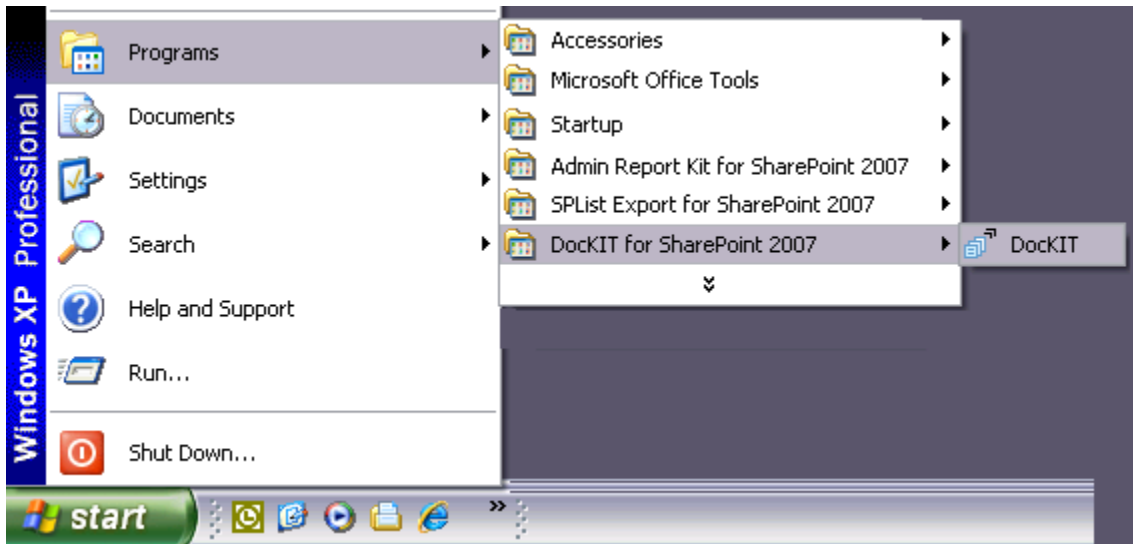
DockIT Web Services for SharePoint 2007 is now installed on your computer and fully functional.




#### 4.7. Launching DockIT for SharePoint 2007

---

Having finished the DockIT for SharePoint 2007 installation, DockIT for SharePoint 2007 is accessible from the menu Start / All Programs / DockIT for SharePoint 2007 / DockIT

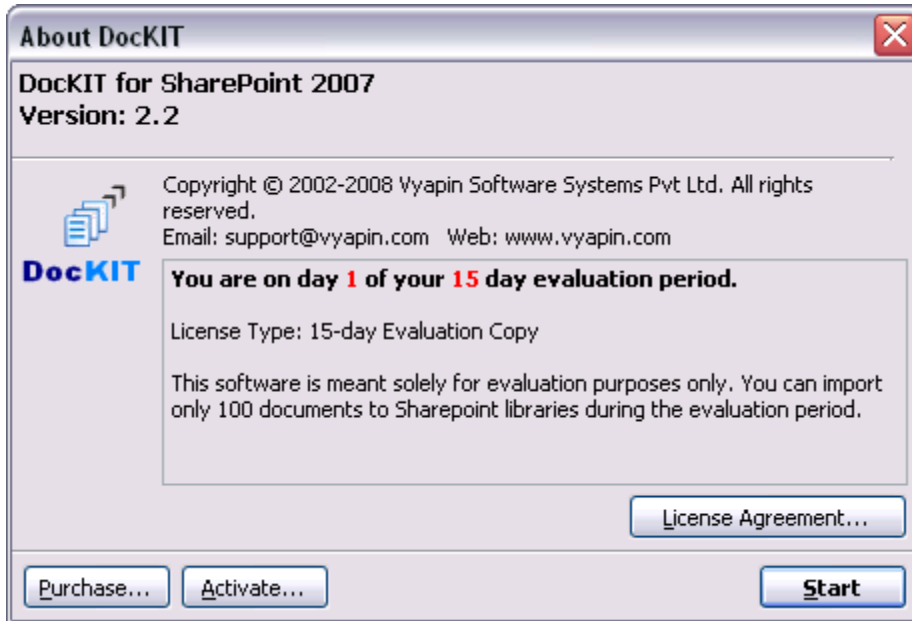


Once you select DockIT from Programs you will be prompt with the screen below. The screen that you view shows that the application is under evaluation period and it also highlights the number of days that you can use this application.

 **Note:** DockIT for SharePoint 2007 (DockIT) product's evaluation version has the 15-day limit and the 100 items import limit, whichever comes first.

#### 4.8. Evaluation Screen (Information)

---



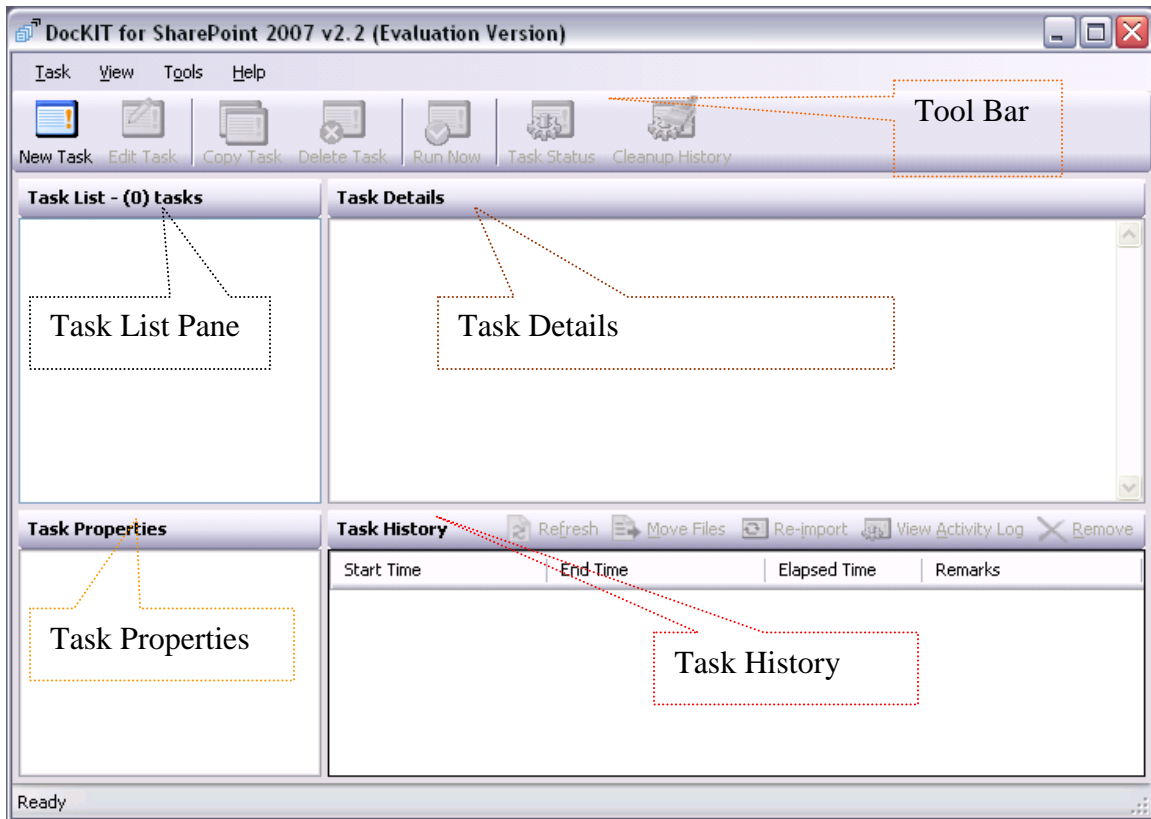
Press the **Start** button to continue.



## 5) DockKIT User Interface

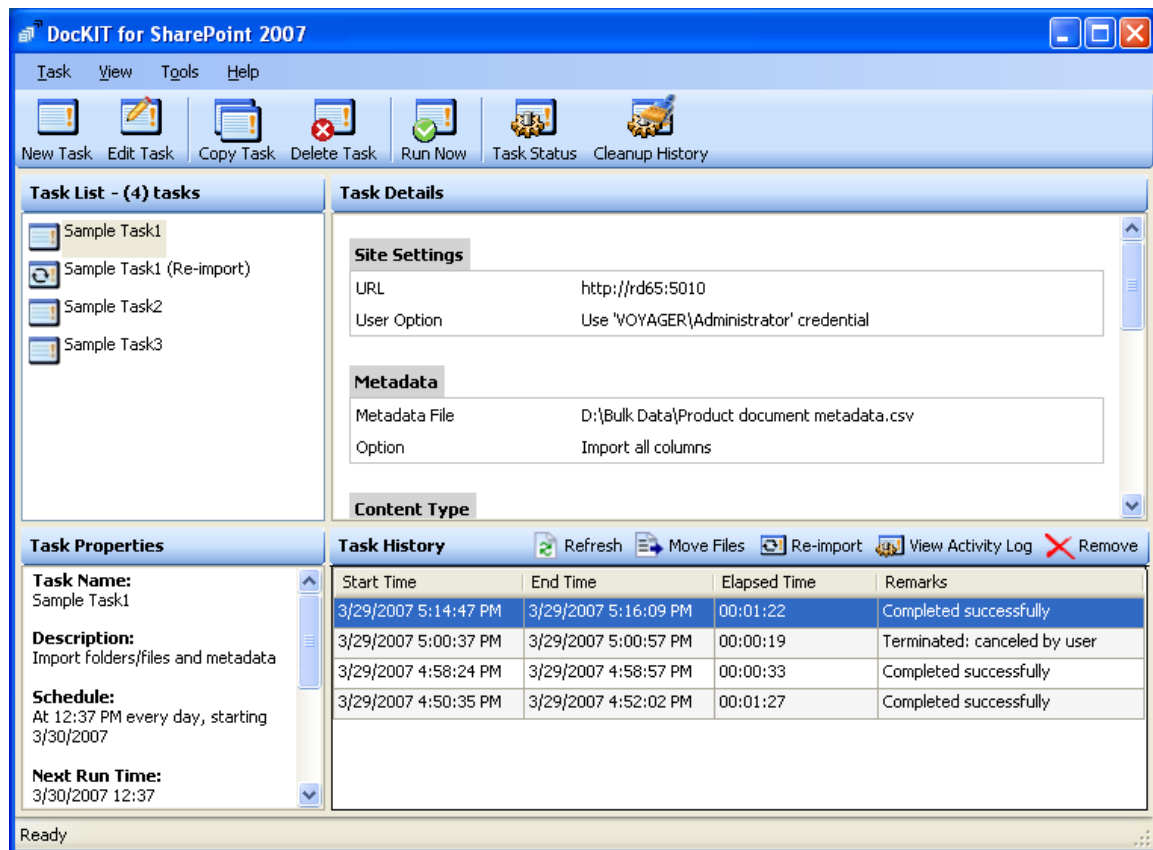
### 5.1. DockKIT for SharePoint 2007 (Main Screen)

---



## 5.2. Task Manager

DockKIT creates import tasks for import process setup to migrate documents and metadata from file system to SharePoint. DockKIT Task Manager in the main application window will help you manage DockKIT import tasks and their corresponding task history. DockKIT Task Manager provides menu and tools to work with the tasks easily.



DockKIT Task Manager contains a standard menu bar and toolbar along with four panes to manage DockKIT import task effectively:

[Task List pane](#)

[Task Properties pane](#)

[Task Details pane](#)

[Task History pane](#)

### 5.3. Standard menu bar and toolbar

---

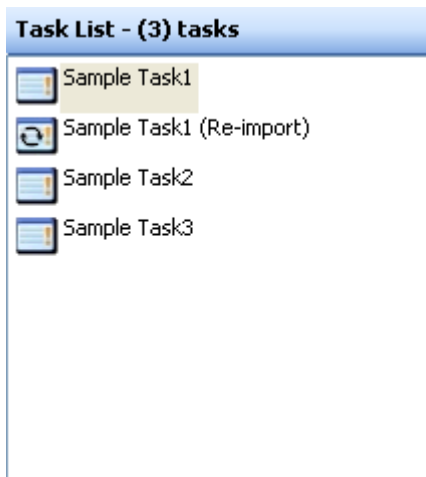
Standard menu bar and toolbar contain all the commands (or actions) to work with a DockKIT import task



### 5.4. Task List

---

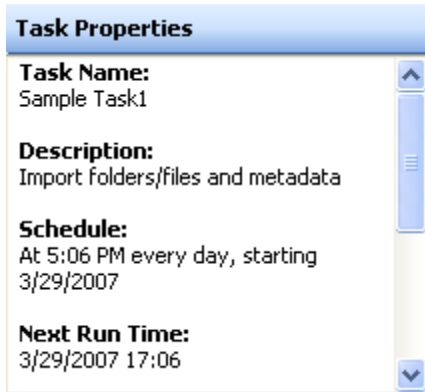
Task List pane contains all export tasks created by the user. Task related operations such as Edit Task, Copy Task, Delete Task and Run Now can be performed based on the selected task in the Task List pane. The remaining panes will change their content based on the selected task. Total task count will be displayed at the top of the banner.



### 5.5. Task Properties

---

Task Properties pane displays the information about the currently selected task in Task List pane. It provides information about Task Name, Task Type, Created On and Last Modified On. If the currently selected task is setup to run using a Windows Scheduled Task (setup to run at a scheduled time), then the Task Properties adds additional information about schedule task such as Run As and Last Run status etc.



**Task Properties**

**Task Name:**  
Sample Task1

**Description:**  
Import folders/files and metadata

**Schedule:**  
At 5:06 PM every day, starting  
3/29/2007

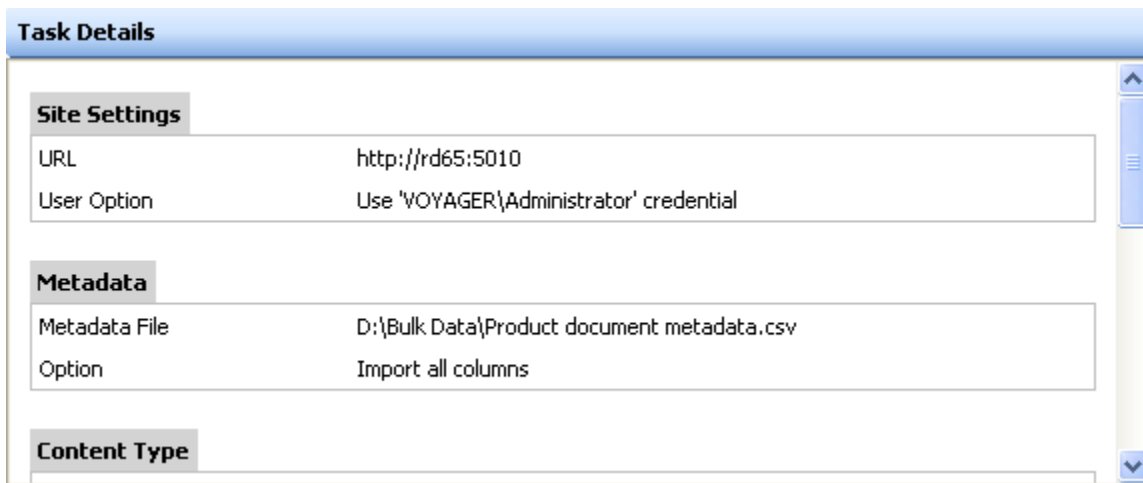
**Next Run Time:**  
3/29/2007 17:06

The Task Properties pane is a vertical window with a blue header. It contains four sections: Task Name, Description, Schedule, and Next Run Time. Each section has a label in bold and its corresponding value below it. A vertical scrollbar is on the right side.

## 5.6. Task Details

---

Task Details pane displays the task settings about currently selected task in Task List pane.



**Task Details**

**Site Settings**

URL	http://rd65:5010
User Option	Use 'VOYAGER\Administrator' credential

**Metadata**

Metadata File	D:\Bulk Data\Product document metadata.csv
Option	Import all columns






**Content Type**

The Task Details pane is a vertical window with a blue header. It contains three sections: Site Settings, Metadata, and Content Type. Each section has a label in bold and its corresponding settings below it. The Site Settings and Metadata sections are each enclosed in a table. A vertical scrollbar is on the right side.

## 5.7. Task History

---

Task History pane maintains every task run information as a list. It displays the required information about task execution status. It displays Task's Start Time, End Time, Elapsed Time and Remarks.

Task History			
 Refresh  Move Files  Re-import  View Activity Log  Remove			
Start Time	End Time	Elapsed Time	Remarks
5/30/2008 2:09:28 PM	5/30/2008 2:11:14 PM	00:01:45	Incomplete: refer activity log
5/30/2008 11:32:51 AM	5/30/2008 11:33:08 AM	00:00:16	Completed successfully

## 6) DockIT Task Management

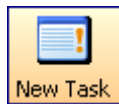
### 6.1. How to create a new task

---

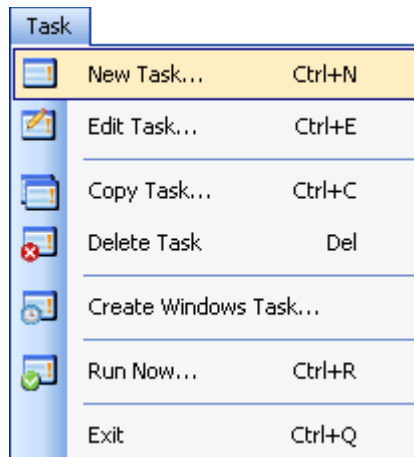
You can create a task to import folders / files from file system or network share to a SharePoint Library. DockIT facilitates importing files and its associated metadata to SharePoint library using the following import methods (or task types):

1. **Import folders/files and metadata:** Import folders and files along with metadata (external metadata file and file properties) from file system to SharePoint library based on the folders/files manually added by the user using the DockIT user interface.
2. **Import documents from a batch descriptor file:** Import folders and files along with metadata (external metadata file and file properties) from file system to SharePoint library based on the entries in the batch descriptor file. DockIT processes the files in the order in which they appear in the batch descriptor file
3. **Apply metadata to documents from metadata file:** Update document properties to documents already residing in a SharePoint library using the values specified in the metadata file.

1. Click **New Task** from DockIT main screen.

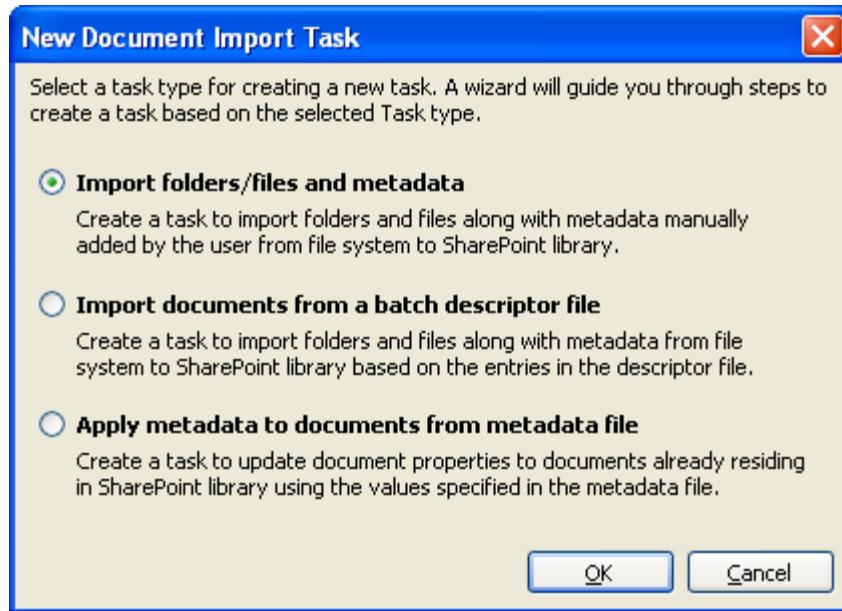


Or Select **New Task** from **Task** menu



Or Press **Ctrl + N**

2. Select a task type in **New Task** dialog and click **OK**.



3. Click the links below for more information:

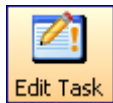
- Create a task to [import folders / files and metadata](#)
- Create a task to [import documents from a batch descriptor file](#)
- Create a task to [apply metadata to documents from metadata file](#)

## 6.2. How to edit an existing task

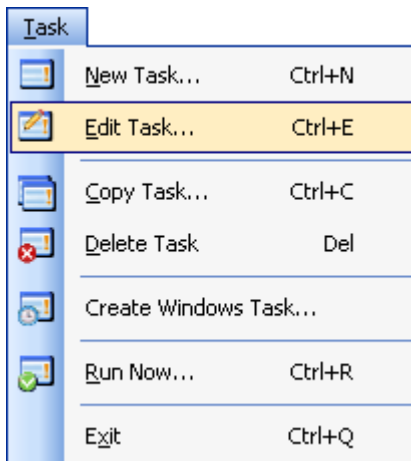
---

To edit an existing task:

1. Select a task in the **Task List** pane.
2. Click **Edit Task** from DockIT main screen.



Or Select **Edit Task** from **Task** menu



Or Press **Ctrl + E**

3. **DockIT Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.
4. Click the links below for more information:
  - edit [import folders / files and metadata](#) task
  - edit [import documents from a batch descriptor file](#) task
  - edit [apply metadata to documents from metadata files](#) task

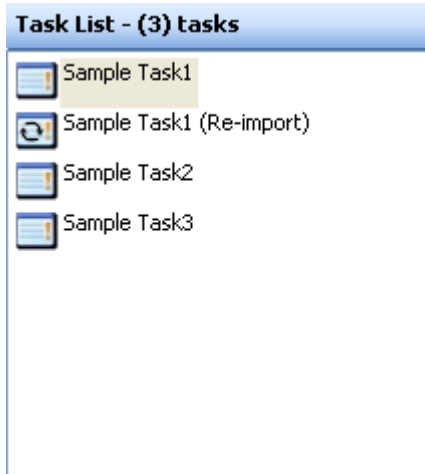


### 6.3. How to copy an existing task

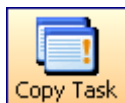
---

To copy or create a new task from an existing DockIT export task:

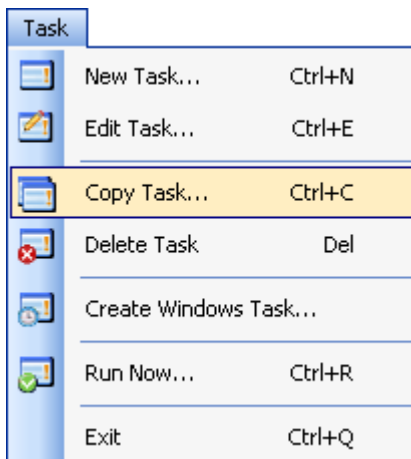
1. Select a task from the **Task List** pane.



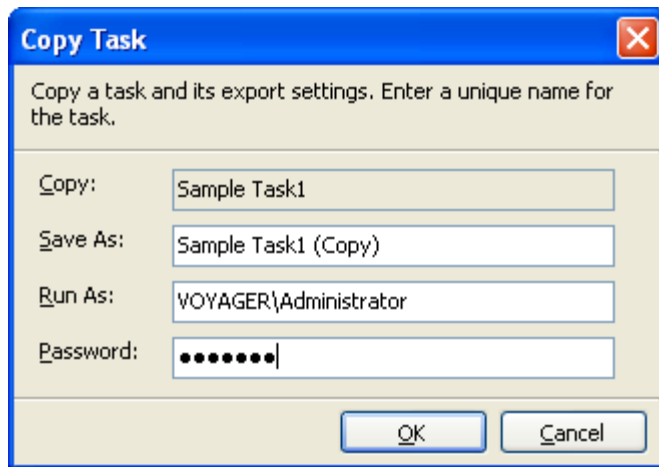
2. Click **Copy Task** from DockIT main screen.



Or Select **Copy Task** from **Task** menu



3. In **Copy Task** dialog, enter a new task name in **Save As** text-box; specify a **Run As** account and **Password** (if applicable) and Click **OK** to create a new task with the same export settings specified in the selected task.

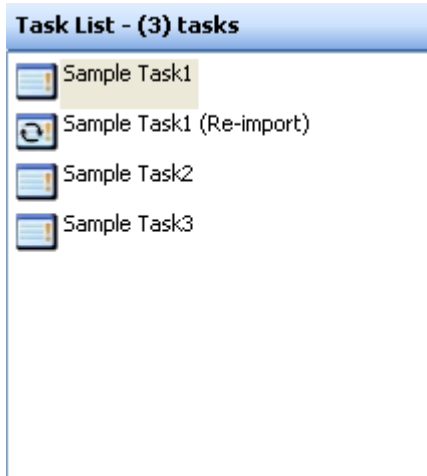


## 6.4. How to delete an existing task

---

To delete a DockIT export task:

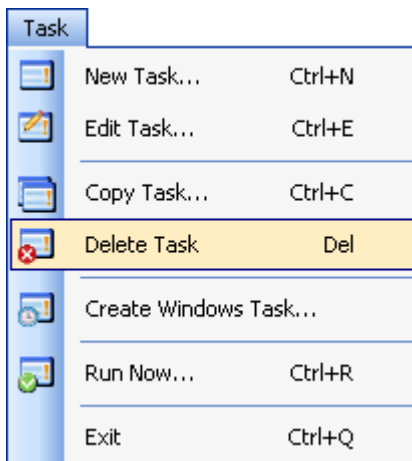
1. Select a task from **Task List** pane.



2. Click **Delete Task** from DockIT main screen.

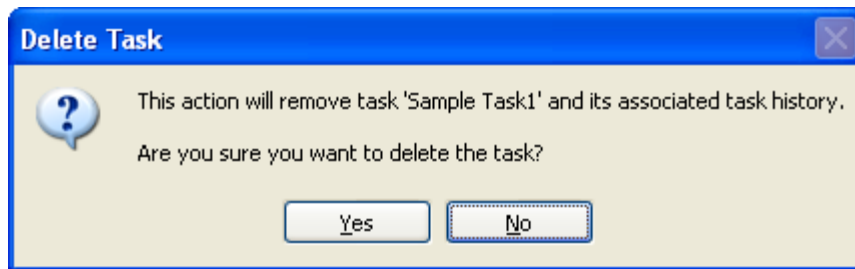



Or Select **Delete Task** from **Task** menu



Or Press **Del** key

3. Click **Yes** in **Delete Task** message-box shown below:



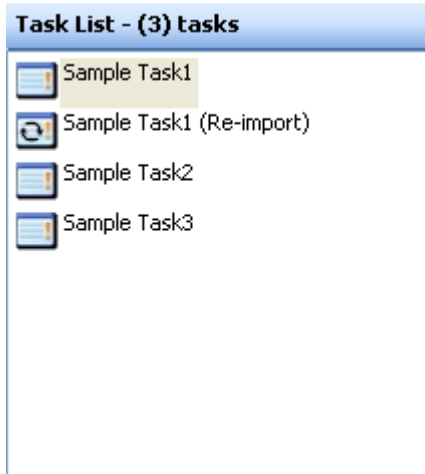
 **Note:** Deleting a task will permanently delete the selected task and its task history items.

## 6.5. How to run a task

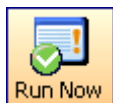
---

DockKIT 'Run Now' feature allows the user to instantiate a task anytime after the task has been created. To run a DockKIT export task:

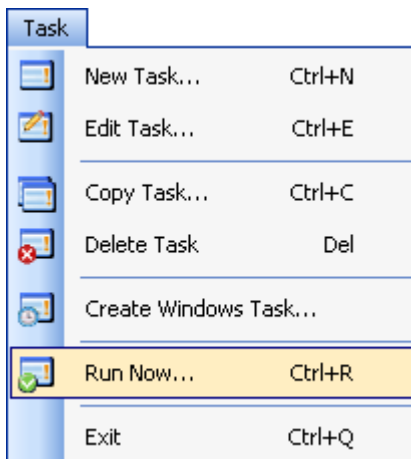
1. Select a task from **Task List** pane.



2. Click **Run Now** from DockKIT main screen.

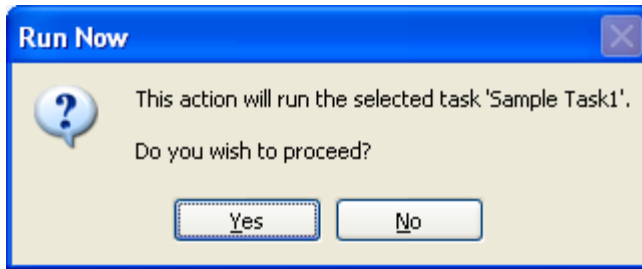


Or Select **Run Now** from **Task** menu

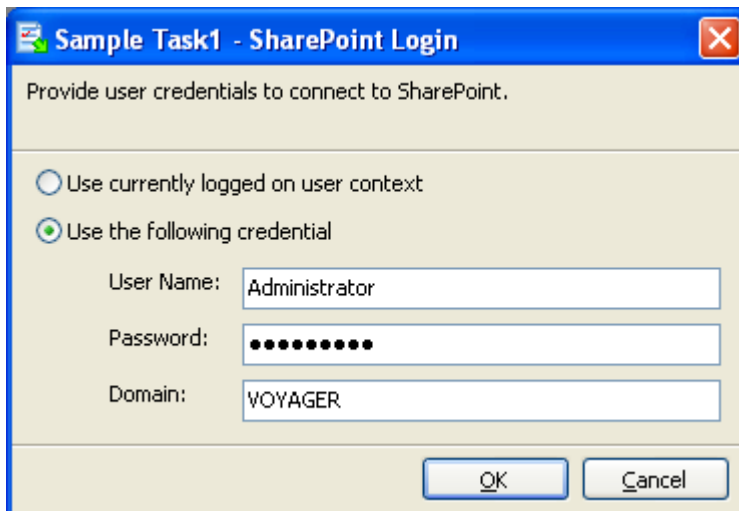


Or Press **Ctrl + R** key

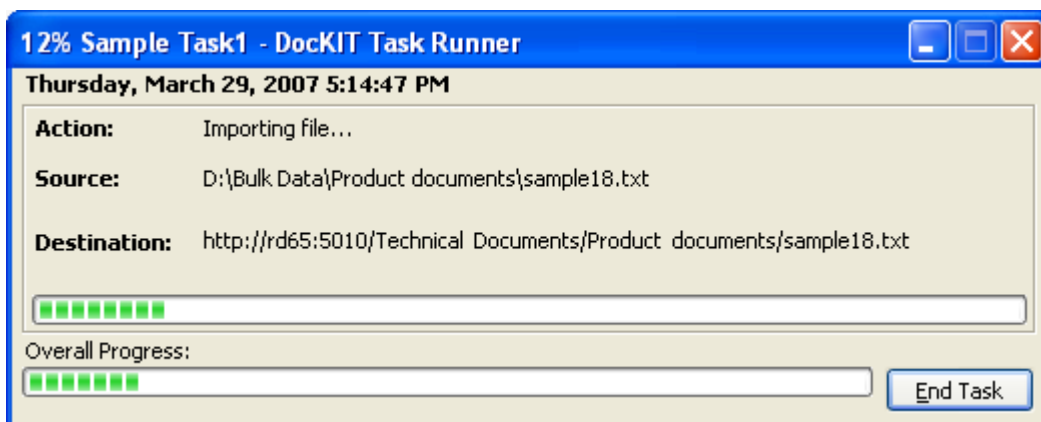
3. Click **Yes** in **Run Now** confirmation message box shown below:



4. The **Credential Dialog** will appear as shown below. The given credential will be used to connect to the SharePoint site.



5. The current process of task will be reported in a new dialog as shown below:



6. Once the export task is complete, a new entry will be added in **Task History** section, where you can view the export activity performed when the task ran last.

## 6.6. How to run a task from command line

---

DockIT command line feature allows the user to instantiate a task from DOS command prompt anytime after an export task has been created using DockIT's task wizard.

To run a DockIT export task from command line:

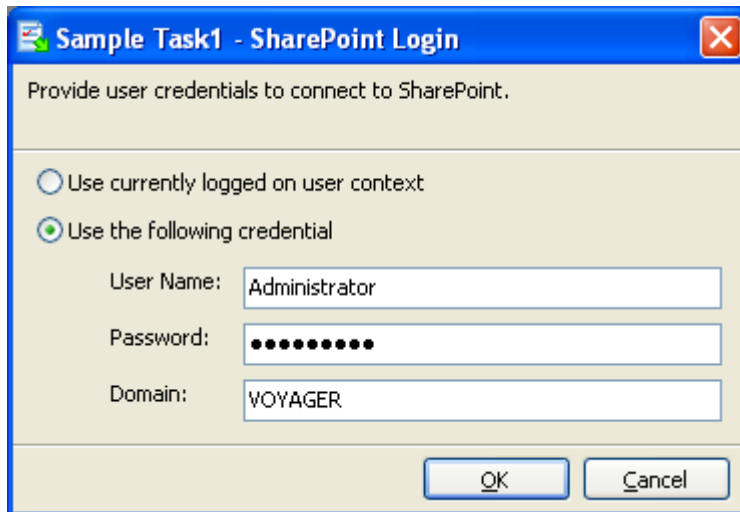
1. **Usage:**

**DockITTaskRunner <task name> [/u:<domain name\user name>] [/p:password] [/noprompt]**

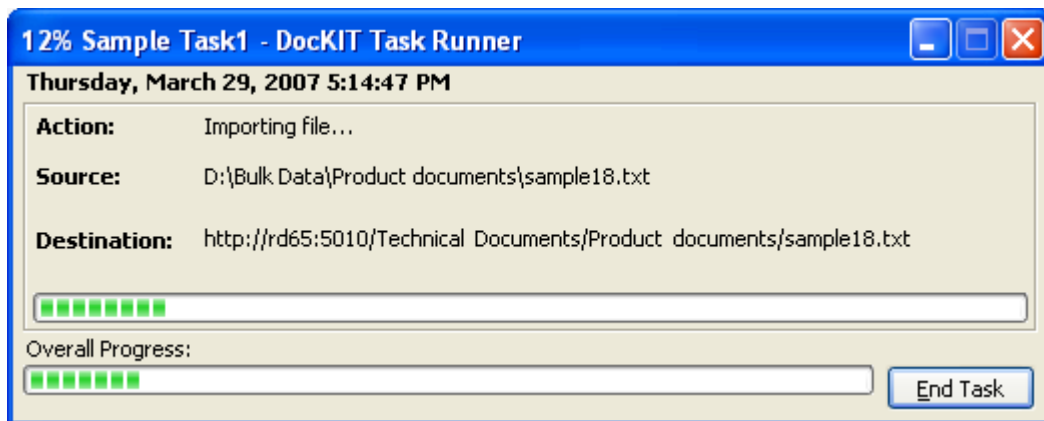
where,

DockITTaskRunner	Name of the DockIT Task Runner application. Specify absolute path where the DockITTaskRunner located.  For example: C:\Program Files\DockIT2007\DockITTaskRunner
task name	Name of the DockIT Task to be run from DOS command prompt. Enclose the task name in double quotes.  For example: "Sample Task1"
/u	Denotes user name context in which DockIT task must be run in the domain\username format. Enclose the user name in double quotes.  For example: "/u:voyager\administrator"
/p	Denotes the password for the user name specified in /u parameter. Enclose the password in double quotes.  For example: "/p:2ab45fb"
/noprompt	This optional flag suppresses DockIT's login dialog prompt to enter user credentials to connect to SharePoint

2. If **/noprompt** flag is not used, then the **Credential Dialog** will appear as shown below. The given credential will be used to connect to SharePoint.



3. The export task will be reported in a new dialog as shown below:



4. Once the export task is complete, click **Refresh** button available in Task History pane in DockIT main application. A new entry will be added in **Task History** section, where you can view the export activity performed when the task ran last.

#### Examples of invoking an export task from the command prompt:

```
C:\Program Files\DockIT2007> DockITTaskRunner "mytask1"  
"/u:voyager\administrator" "/p:2az" /noprompt
```

```
C:\Program Files\DockIT2007> DockITTaskRunner "Sample Task1"  
"/u:voyager\adminuser" "/p:2az$%&" /noprompt
```

```
D:\>"C:\Program Files\DockIT2007\DockITTaskRunner" "Sample Task1 (Re-  
import)" "/u:voyager\adminuser" "/p:2az$%&" /noprompt
```

#### DOS batch file examples:

- To execute DockIT task one by one from a batch file:



```
"C:\Program Files\DocKIT2007\DocKITTaskRunner" "Sample Task1"  
"/u:voyager\adminuser" "/p:2az$%&" /noprompt
```

```
"C:\Program Files\DocKIT2007\DocKITTaskRunner" "Sample Task2"  
"/u:voyager\testuser" "/p:test" /noprompt
```

- To execute multiple DockIT tasks simultaneously:

```
start "cmd" "C:\Program Files\DocKIT2007\DocKITTaskRunner" "Sample  
Task1" "/u:voyager\user1" "/p:ctest1" /noprompt
```

```
start "cmd" "C:\Program Files\DocKIT2007\DocKITTaskRunner" "Sample  
Task2" "/u:voyager\user2" "/p:ctest2" /noprompt
```

## 6.7. Creating Windows Task in Windows Task Scheduler

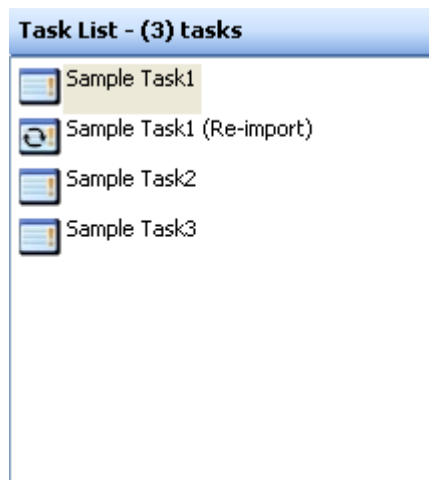
---

Use this tool to create a Windows Task in Windows Task Scheduler interface to automatically run the export tasks at scheduled intervals.

This tool helps you to re-create the Windows Schedule Task in the following two scenarios:

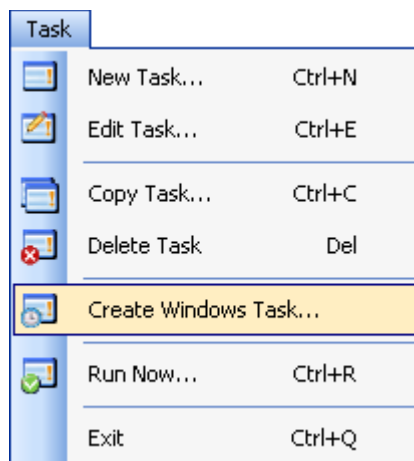
- To create Windows Schedule Task that was accidentally deleted and is required to be created again with the same schedule settings
- To create Windows Schedule Task when the DockIT export tasks are migrated from an old machine to a new machine

1. Select a task from the **Task List** pane

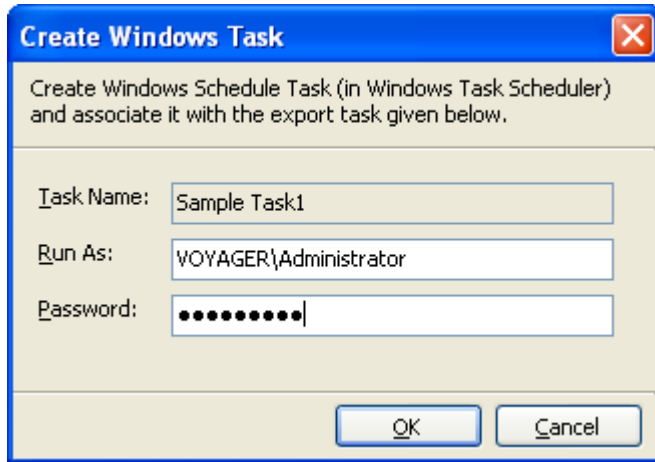


2. If DockIT has enough information about the required Windows Schedule Task, the **Create Windows Task** option will be enabled.

Select **Create Windows Task** from **Task** menu



3. In **Create Windows Task** dialog, specify a **Run As** account and **Password** and Click **OK** to create a new schedule task with the same schedule settings that was previously saved by DockIT Import Task Wizard.



The image shows a Windows dialog box titled "Create Windows Task". The dialog has a blue title bar with a close button (X) in the top right corner. Below the title bar, the text reads: "Create Windows Schedule Task (in Windows Task Scheduler) and associate it with the export task given below." There are three input fields: "Task Name:" with the text "Sample Task1", "Run As:" with the text "VOYAGER\Administrator", and "Password:" with a masked password represented by ten dots. At the bottom right, there are two buttons: "OK" and "Cancel".

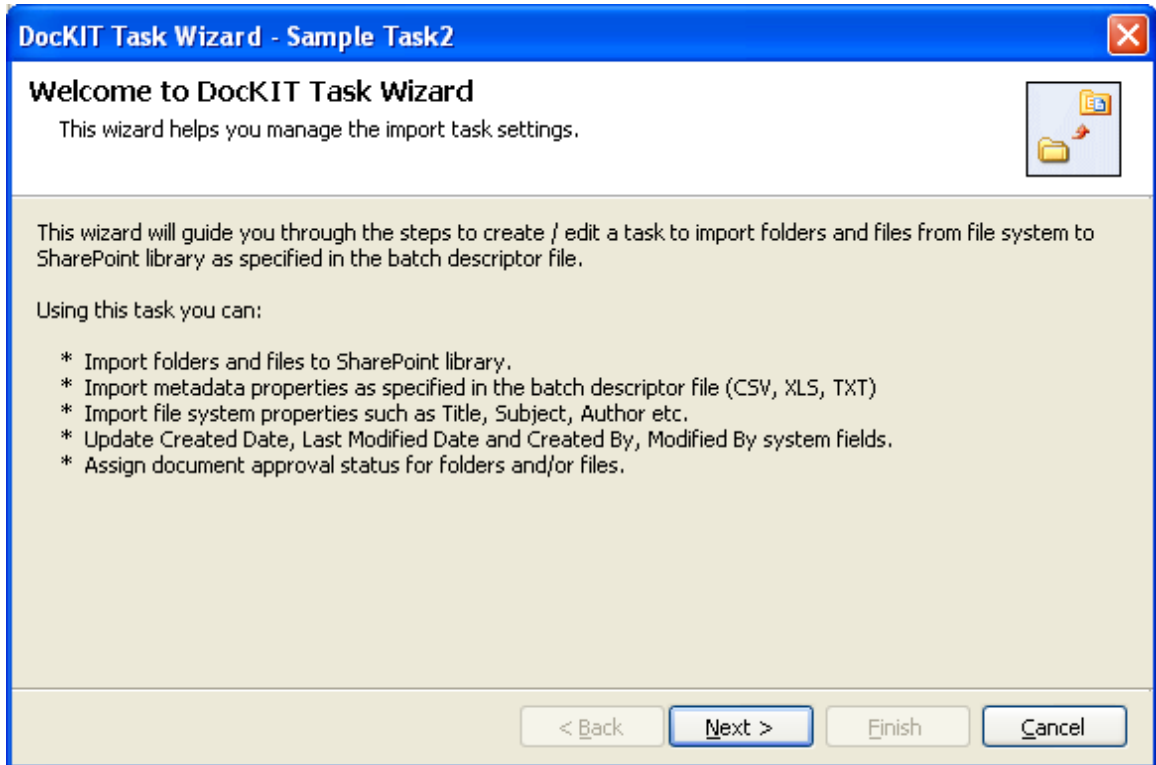
Field	Value
Task Name:	Sample Task1
Run As:	VOYAGER\Administrator
Password:	.....

## 6.8. How to manage an existing task

---

Edit task is similar to creating a task, except that a few settings cannot be altered as stated below.

1. The **DocKIT Task Wizard** appears



2. Click **Next** button
3. Specify [Metadata Options](#)
4. Specify [File System Properties](#)
5. Specify [System Dates](#)
6. Specify [System Users](#)
7. Specify [Content Type Settings](#)
8. Specify [Content Approval Status](#)
9. Specify [Rename folders and files](#)
10. Specify [Folder Options](#)
11. Specify [File Settings](#)

12. Specify [Import Conditions](#)
13. Specify [Document Status](#)
14. In [Task Settings](#) edit mode, DockKIT Task Wizard the task name cannot be altered.

**DockKIT Task Wizard - Sample Task2**

**Step 12 of 13: Task Settings**

Enter a unique name for the import task and specify schedule task settings.

**Task Name:** Sample Task2

**Task Option:** ☒ Run task upon clicking Finish button ☐ Run later ☐ Create Schedule Task

**Run As:** VOYAGER\Administrator **Set Password...**

**Schedule:** Daily **Start time:** 12:00 PM **Advanced...**

**Schedule Task Daily**

Every 1 day(s)

At 12:00 PM every day, starting 3/30/2007

**< Back** **Next >** **Finish** **Cancel**

15. Specify [Validate Task Settings](#)
16. Click **Finish** button to save the task settings, or click **Back** button to go back to a previous step.

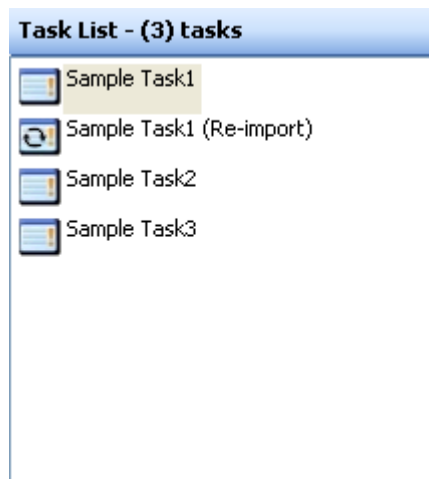
## 6.9. How to view task history

When an export task is run in DockIT, the task export information is maintained in the 'TaskHistory' folder. The task history information can be seen at right-bottom of DockIT application's main window.

Task History			
Refresh Move Files Re-import View Activity Log Remove			
Start Time	End Time	Elapsed Time	Remarks
5/30/2008 2:09:28 PM	5/30/2008 2:11:14 PM	00:01:45	Incomplete: refer activity log
5/30/2008 11:32:51 AM	5/30/2008 11:33:08 AM	00:00:16	Completed successfully

To view task history of a particular task:

1. Select a task from **Task List** pane.



2. The history of task will be displayed at right-bottom of DockIT main window as shown below.

Task History			
Refresh            Move Files            Re-import            View Activity Log            Remove			
Start Time	End Time	Elapsed Time	Remarks
5/30/2008 2:09:28 PM	5/30/2008 2:11:14 PM	00:01:45	Incomplete: refer activity log
5/30/2008 11:32:51 AM	5/30/2008 11:33:08 AM	00:00:16	Completed successfully

### Where

Start Time -> Date and Time a task was initiated.

End Time -> Date and Time a task completed its export process

Elapsed Time -> Total time (hh:mm:ss) a task has taken to complete its export process.

Remarks -> Brief remark about the status of export.

#### Possible Remarks

Completed successfully

Incomplete: refer activity log

Incomplete: eval limit reached

Terminated: canceled by user

Terminated abnormally  
Failed: the following error occurred while creating activity log

#### Description

*Import process was completed successfully without any errors*

*Import process encountered certain errors as described in the activity log*

*Import process reached the maximum allowed number of files to export in evaluation / trial version. This message is applicable for evaluation / trial version only. Import process was canceled by the user.*

*The import process was abnormally terminated / killed. The import process could not be initiated as there were issues in creating the activity log files and initiating the export process.*

The following operations can be performed on Task history items:

- [View activity log](#)
- [Remove a task history item](#)
- [Manage task status](#)
- [Cleanup history](#)

## 6.10. How to view activity log

---

To view activity log associated with a task history item:

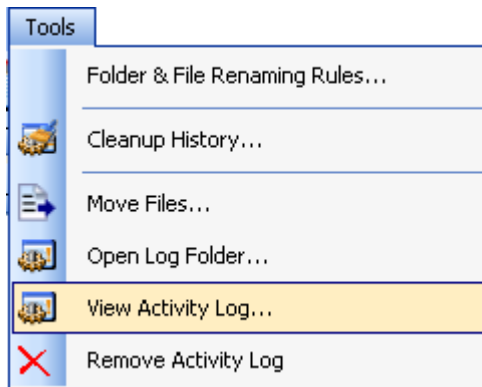
1. Select an item from **Task History** pane.

Task History			
Refresh Move Files Re-import View Activity Log Remove			
Start Time	End Time	Elapsed Time	Remarks
5/30/2008 2:09:28 PM	5/30/2008 2:11:14 PM	00:01:45	Incomplete: refer activity log
5/30/2008 11:32:51 AM	5/30/2008 11:33:08 AM	00:00:16	Completed successfully

2. Click **View Activity Log** from DockIT main screen.

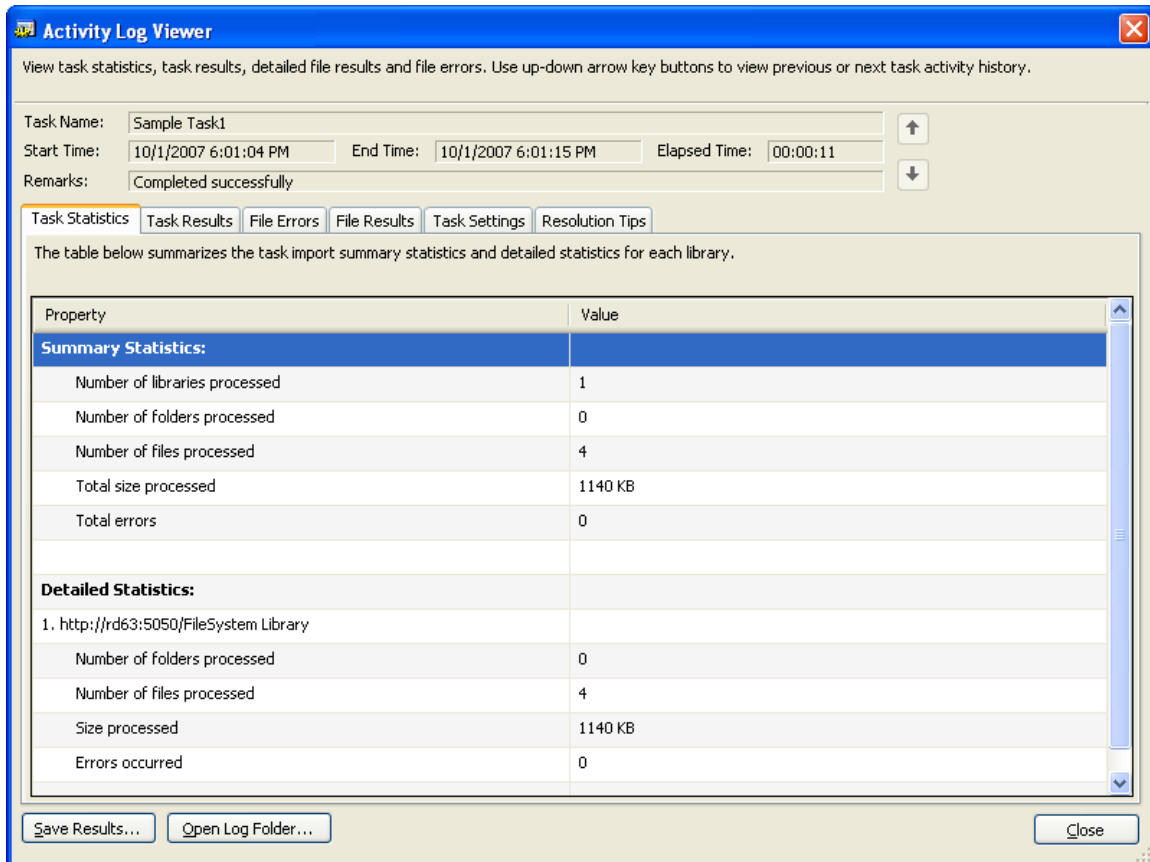


Or Select **View Activity Log** from Tools menu




3. The **Activity Log Viewer** dialog appears as shown below.





4. The activity log of a task is classified into four different categories (seen under separate tabs):
  - a) **Task Statistics:** Displays a brief summary of the task export summary statistics and detailed statistics for each library.
  - b) **Task Results:** Displays detailed result of each task level check.
  - c) **File Errors:** Displays detailed report of errors that occurred during export.
  - d) **File Results:** Displays detailed log of all items processed in the export task.
  - e) **Task settings:** Displays settings specified for the task at the time of export.
5. Click **Save Results** button to save the task results in Microsoft Excel format. Each tab in ActivityLogViewer dialog is stored as a separate worksheet in MS-Excel.
6. Click **Open Log Folder** button to open the folder that contains the activity log of the currently displayed task history item.

 **Note:** For all errors, refer **File Errors** section of **Activity Log** to view a description of the actual error that occurred during export.

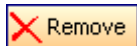
## 6.11. How to remove a task history item

To remove a task history item:

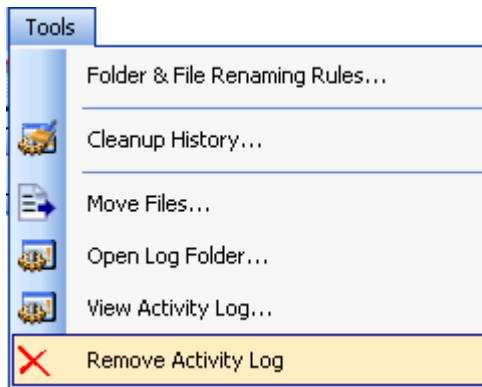
1. Select item from **Task History** pane.

Task History			
Refresh                      Move Files                      Re-import                      View Activity Log                      Remove			
Start Time	End Time	Elapsed Time	Remarks
5/30/2008 2:09:28 PM	5/30/2008 2:11:14 PM	00:01:45	Incomplete: refer activity log
5/30/2008 11:32:51 AM	5/30/2008 11:33:08 AM	00:00:16	Completed successfully

2. Click **Remove** from DockKIT main screen.



Or Select **Remove Activity Log** from **Tools** menu



This will remove the currently selected activity log entry and log folders & files associated with the task history item. To maintain task history items, see [Cleanup history](#) and [Task Status](#).

## 6.12. How to cleanup history

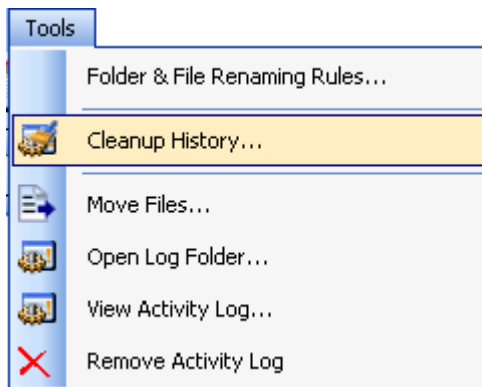
---

DockIT maintain the task history of each task run in the application task history folder e.g., C:\Program Files\DockIT2007\TaskHistory\<taskname>\<timestamp>. Over a period of time, the task history folder grows in size. We recommend cleaning up the task history periodically to control the disk space usage. To cleanup task history, perform the following steps given below:

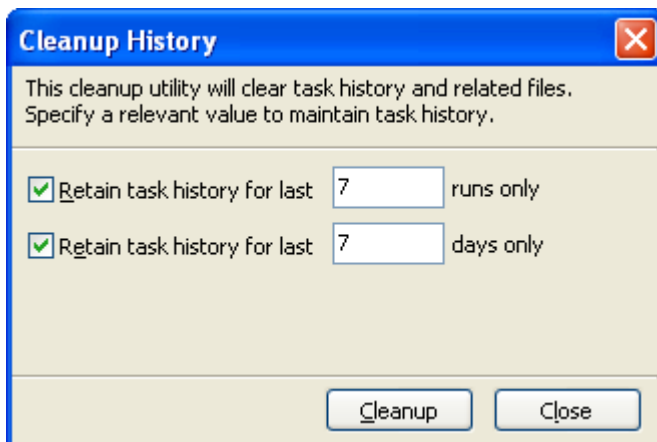
1. Click **Cleanup History** from DockIT Task Manager.



Or Select **Cleanup History** from **Tools** menu



2. The **Cleanup History** dialog appears as shown below:



- a) Selecting **Retain task history for last <n> runs only** option will remove all history entries for each task that are older than <n> runs (task instances).
- b) Selecting **Retain task history for last <n> days only** option will remove all history entries for each task that are older than <n> days.

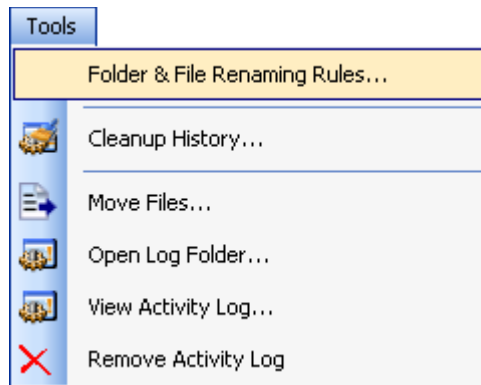
### 6.13. Rules for renaming folder & file

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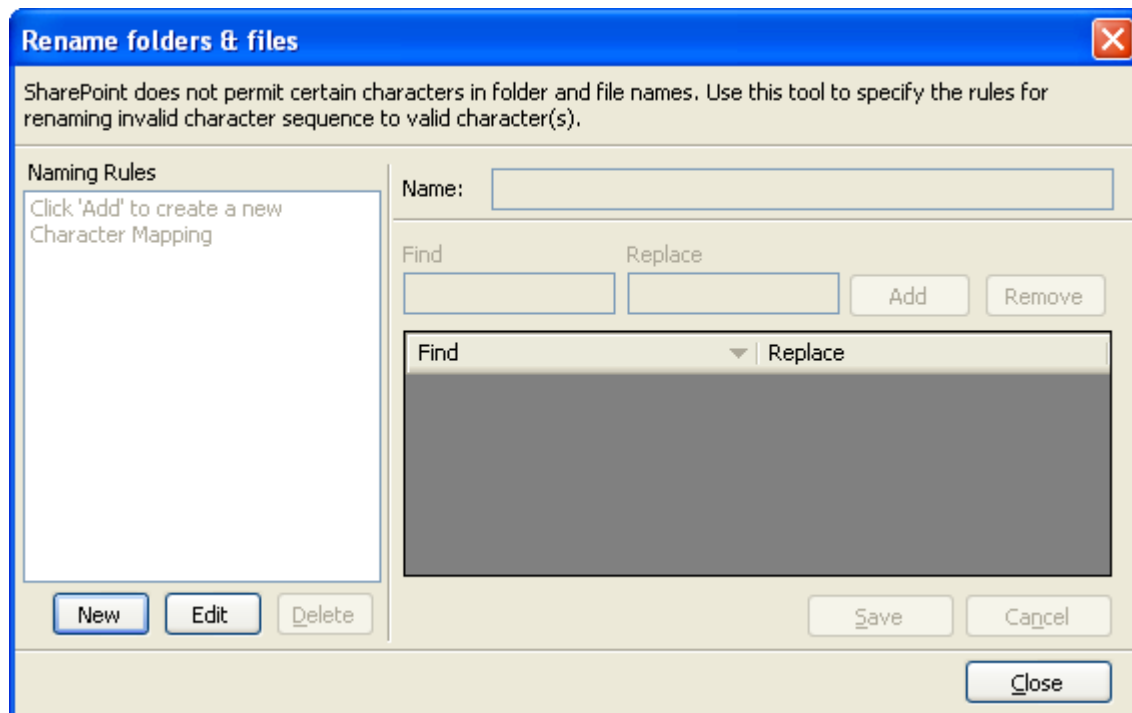
SharePoint does not permit certain characters in folder and file names. DocKIT provides an ability to rename invalid character(s) to valid character(s), thereby eliminating the tedious step of renaming the source folders / files. You can create naming rules, save them as **Naming Rules** and re-use them in your import tasks.

To specify a rule for invalid character sequence to valid character sequence:

1. Select Folder & File Renaming Rules from Tools menu

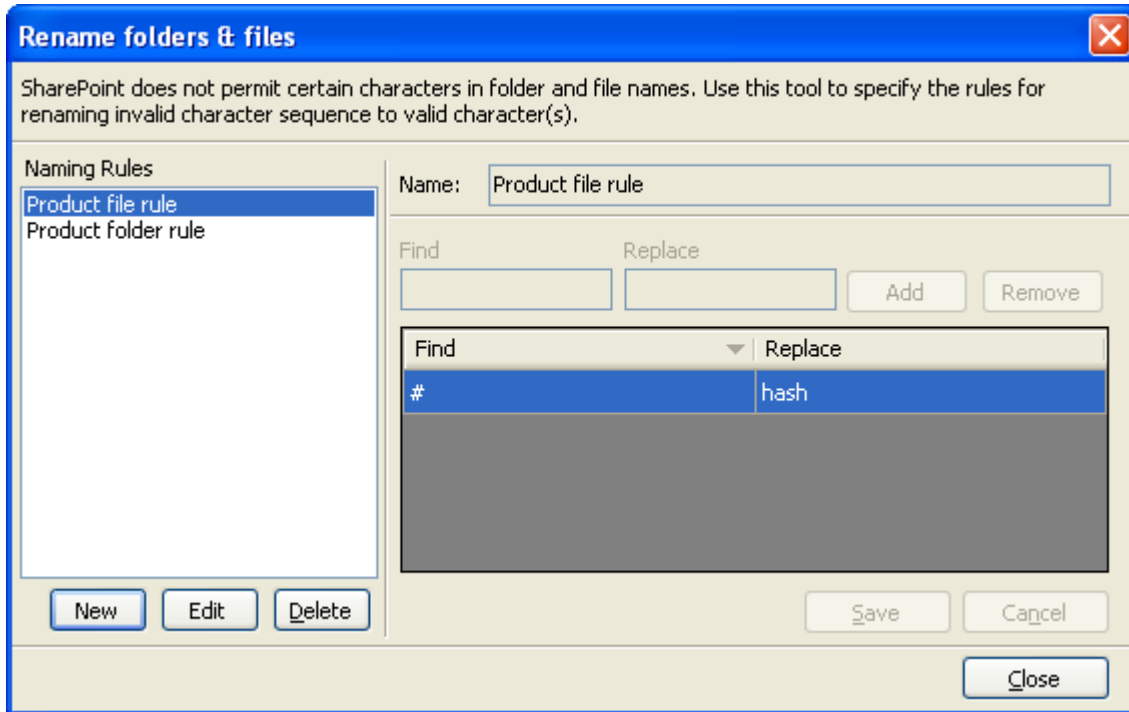


2. The **Rename folder & files** dialog appears as shown below:



3. Click **New** button to create a new naming rule:

- a) Specify a unique rule name in **Name** textbox.
  - b) Specify the SharePoint invalid character in **Find** textbox and its valid character in **Replace** textbox, then click **Add** button.
  - c) Click **Remove** button to remove the selected naming rule.
4. Click **Edit** button to modify the existing naming rule



5. Click **Delete** button to delete an existing naming rule.

## 6.14. How to Import System Dates

---

DockKIT updates SharePoint System Dates (Created Date and Last Modified Date) fields for both folders and files in SharePoint from any one of the following sources using DockKIT Web Services component:

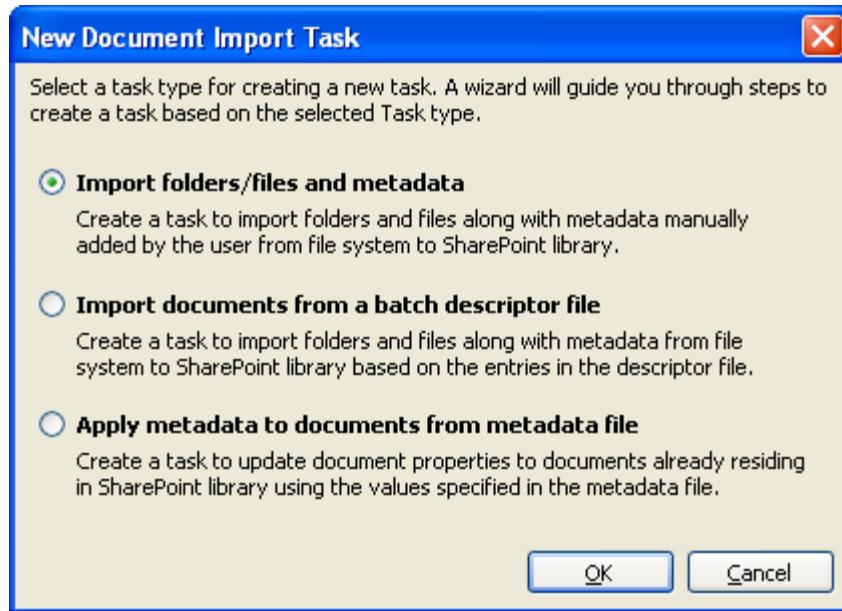
- Original Created Date and Last Modified Date from file system (NTFS)
- Assign from external metadata file
- Assign from custom properties (MS-Office documents only)


DockKIT Web Services allows the user to update the system date fields by running DockKIT for SharePoint 2007 on a remote computer. To update the date fields, follow the steps given below:

1. In order to update System Dates from remote machine, DockKIT provides two application components stated below:
  - DockKIT for SharePoint 2007 application, which can be installed on a Windows XP (or) Windows Vista (or) Windows Server 2003 computer
  - DockKIT Web Services component, which must be installed on a Windows Server 2003 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0 (32-bit or 64-bit platform)

For more information, please visit the System Requirements section in the help file.

2. DockKIT Web Services must be installed in all the destination SharePoint servers that require the date fields to be assigned.
  - Use DockKIT2007\_WebServices\_x86.msi in order to install in 32-bit Windows Server 2003
  - Use DockKIT2007\_WebServices\_x64.msi in order to install in 64-bit Windows Server 2003
3. If necessary, reset IIS, by using **IISRESET /noforce** for the changes to take place in the SharePoint server.
4. You can install DockKIT application in the same SharePoint server or any client machine running Windows XP or Windows Vista, regardless of platform architecture (32-bit or 64-bit platforms).
5. In DockKIT application, create a task using **Import folders / files and metadata** option in **New Document Import Task** dialog as shown below and click OK.



 **Note:** You can also use **Import documents from a batch descriptor file** option to update these date fields from remote machine. The requirement of updating date fields is same as the first task type. In this section, we are taking first type to describe how to use DockIT Task Wizard to update date fields successfully.

6. Specify a SharePoint URL of a site / library / folder location to which you wish to import folders and files from the file system. Specify the users credentials to connect to the SharePoint URL specified in **Step 1 of 15: SharePoint destination location** step in DockIT Task Wizard.

DockIT expects the user name specified in SharePoint Login dialog / user account specified in the Run As parameter in the scheduled task to be a:

Member of administrators group in the local server and remote SQL Server (or)  
Application pool user account (or)  
Owner of the site where the destination library resides

in order to import the these date fields successfully.

**DockIT Task Wizard**

**Step 1 of 15: SharePoint destination location**

Specify a SharePoint URL of a site / library / folder location into which you wish to import folders and files from file system.

URL:

☐ Use currently logged on user context for validation

☒ Use the following credential for validation

User Name:

Password:

< Back   Next >   Finish   Cancel

7. Proceed with steps provided in DockIT Task Wizard.
8. When DockIT connects to a *DockIT Web Services* enables SharePoint server, the System Dates step will appear as shown in the screen below:



**DocKIT Task Wizard**

**Step 5 of 15: System Dates**

Propagate Created Date and Last Modified Date to SharePoint from the original source. This feature requires DockIT Web Services to be installed on the destination SharePoint Server.

**Folder System Dates**

☒ Created Date: Assign from File System Column name: path

☒ Modified Date: Assign from File System Column name: path

**File System Dates**

☒ Created Date: Assign from metadata file Column name: Issue Date

☒ Modified Date: Assign from custom property Property name: Time Modified

Date and Time format: <Use default> <No Time>

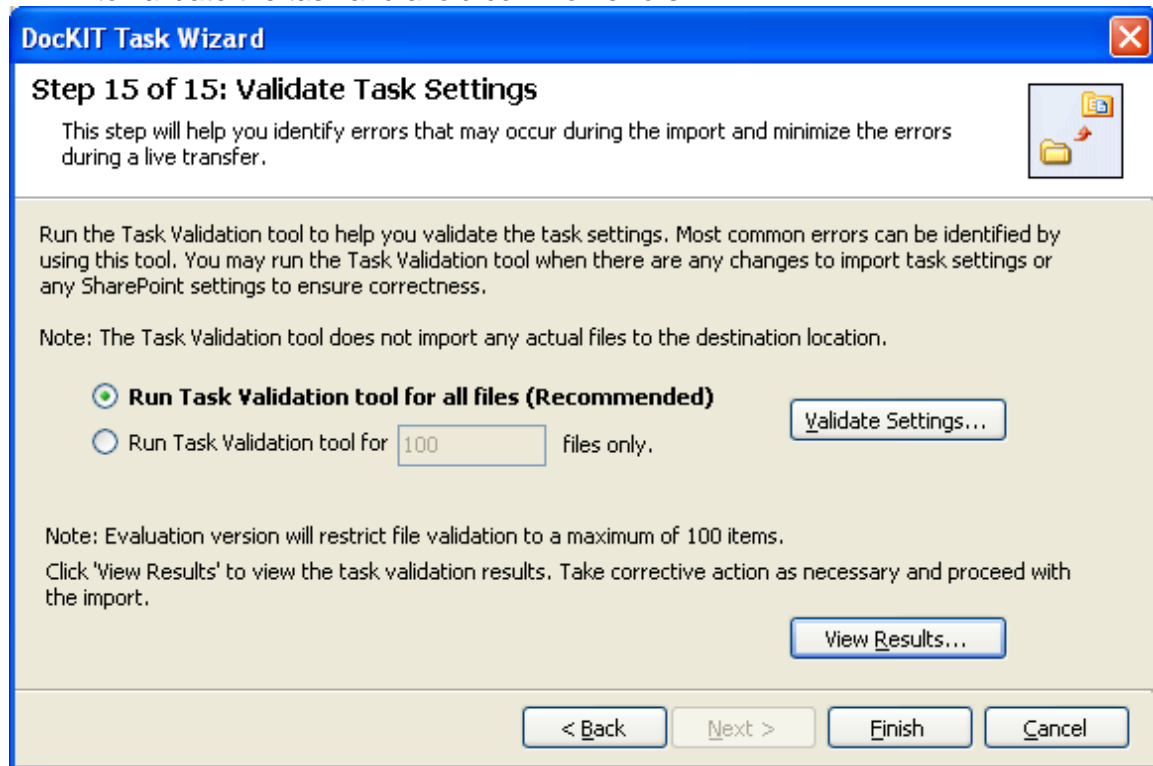
< Back Next > Finish Cancel

**Note:** System Date Fields panel will be disabled if DockIT Web Services is not installed in the destination SharePoint server.

9. You can assign the system date fields for folders and/or files. Select Created Date and Last Modified Date fields checkbox for folders and/or files as appropriate and select one of the options given below:
  - a. **Assign from File System** - DockIT will propagate the original Created Date and Last Modified Date fields as available in the file system (NTFS).
  - b. **Assign from metadata file** - The date fields can be assigned from the external metadata file by including the respective date field columns (e.g., CDate, LModDate) in the metadata file. The date mask specified in Step 3: Metadata Options will be used to parse the date value. If the metadata value is unavailable, invalid or in case of any failure while parsing the date value, the current import time will be assigned automatically.
  - c. **Assign from custom property** (MS-Office documents only) - The date field values can also be assigned from the custom property of the MS-Office document. DockIT can assign the date fields from the custom property value of the respective MS-Office documents. Select the date mask from **Date and Time format** options to parse the date values taken from specified custom property. The default value is the current system settings. If the custom property value is

unavailable, invalid or in case of any failure while reading the date value, the current import time will be assigned automatically.

10. You can use **Step 15 of 15: Validate Task Settings** step in DockIT Task Wizard to validate the task and avoid common errors.



Please see respective help section depending on the task type to get more information about **Task Validation Tool**.

11. Click **Finish** to run.

## 6.15. How to Import System Users

---

DockKIT updates SharePoint system users (Created By and Last Modified By) fields for both folders and/or files in SharePoint from any one of the following sources using DockKIT Web Services component:

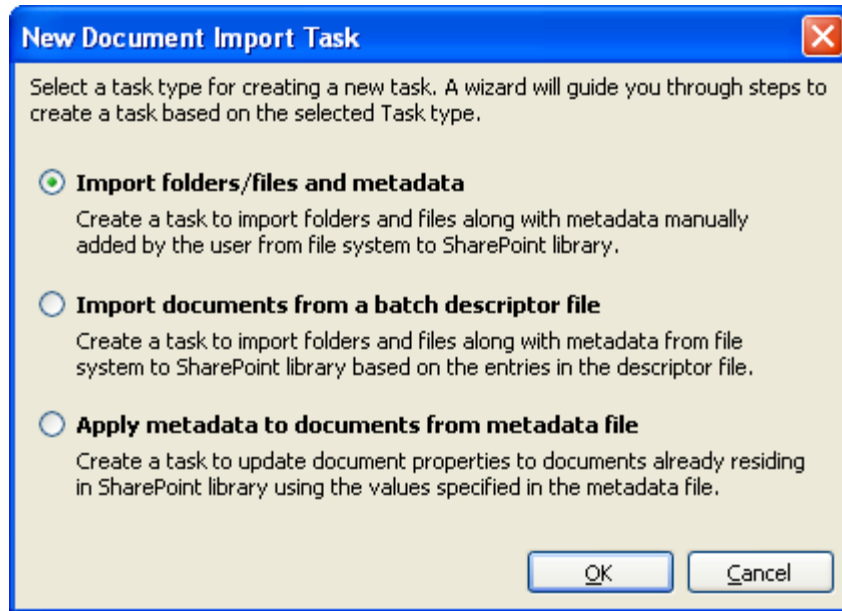
- User specified username for all folders and/or files
- Assign from external metadata file
- Assign from custom properties (MS-Office documents only)


DockKIT Web Services allows the user to update the system user fields by running DockKIT for SharePoint 2007 on a remote computer. To update the user fields, follow the steps given below:

1. In order to update System Users from remote machine, DockKIT provides two application components stated below:
  - DockKIT for SharePoint 2007 application, which can be installed on a Windows XP (or) Windows Vista (or) Windows Server 2003 computer
  - DockKIT Web Services component, which must be installed on a Windows Server 2003 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0 (32-bit or 64-bit platform)

For more information, please visit the System Requirements section in the help file.

2. DockKIT Web Services must be installed in all the destination SharePoint servers that require the system user fields to be assigned.
  - Use DockKIT2007\_WebServices\_x86.msi in order to install in 32-bit Windows Server 2003
  - Use DockKIT2007\_WebServices\_x64.msi in order to install in 64-bit Windows Server 2003
3. If necessary, reset IIS, by using **IISRESET /noforce** for the changes to take place in the SharePoint server.
4. You can install DockKIT application in the same SharePoint server or any client machine running Windows XP or Windows Vista, regardless of platform architecture (32-bit or 64-bit platforms).
5. In DockKIT application, create a task using **Import folders / files and metadata** option in **New Document Import Task** dialog as shown below and click **OK**.



 **Note:** You can also use **Import documents from a batch descriptor file** option to update these system users (Created By / Modified By) from a remote machine. The requirement of updating system fields is same as the first task type. In this section, we are taking first task type to describe how to use DockIT Task Wizard to update the system user fields - Created By & Modified By successfully.

6. Specify a SharePoint URL of a site / library / folder location to which you wish to import folders and files from the file system. Specify the users credentials to connect to the SharePoint URL specified in **Step 1 of 15: SharePoint destination location** step in DockIT Task Wizard.

DockIT expects the user name specified in SharePoint Login dialog / user account specified in the Run As parameter in the scheduled task to be a:

- Member of administrators group in the local server and remote SQL Server (or)
- Application pool user account (or)
- Owner of the site where the destination library resides

in order to import the these user fields successfully.

**DockIT Task Wizard**

**Step 1 of 15: SharePoint destination location**

Specify a SharePoint URL of a site / library / folder location into which you wish to import folders and files from file system.

URL:

☐ Use currently logged on user context for validation


☒ Use the following credential for validation

User Name:

Password:

< Back   Next >   Finish   Cancel

7. Proceed with the steps provided in DockIT Task Wizard.
8. When DockIT connects to a DockIT Web Services enabled SharePoint server, the System Users step will appear as shown in the screen below:

 **Note:** **System Users Fields** panel will be disabled if DocKIT Web Services is not installed in the destination SharePoint server.

9. You can assign the system user fields - Created By and Modified By for folders and/or files. Select Created By and Modified By fields checkbox for folders and/or files as appropriate and select one of the options given below:
  - a. **Assign from metadata file** - The user fields can be assigned from the external metadata file by including the respective user field columns (e.g., Created\_By, Modified\_By) in the metadata file. If the user fields are invalid or if the user is unavailable, SharePoint by default will set the user to be the user account performing the import into the SharePoint library.
  - b. **Assign from custom property** (MS-Office documents only) - The date field values can also be assigned from the custom property of the MS-Office document. DocKIT can assign the date fields from the custom property value of the respective MS-Office documents. If the user fields are invalid or if the user is unavailable, SharePoint by default will set the user to be the user account performing the import into the SharePoint library.

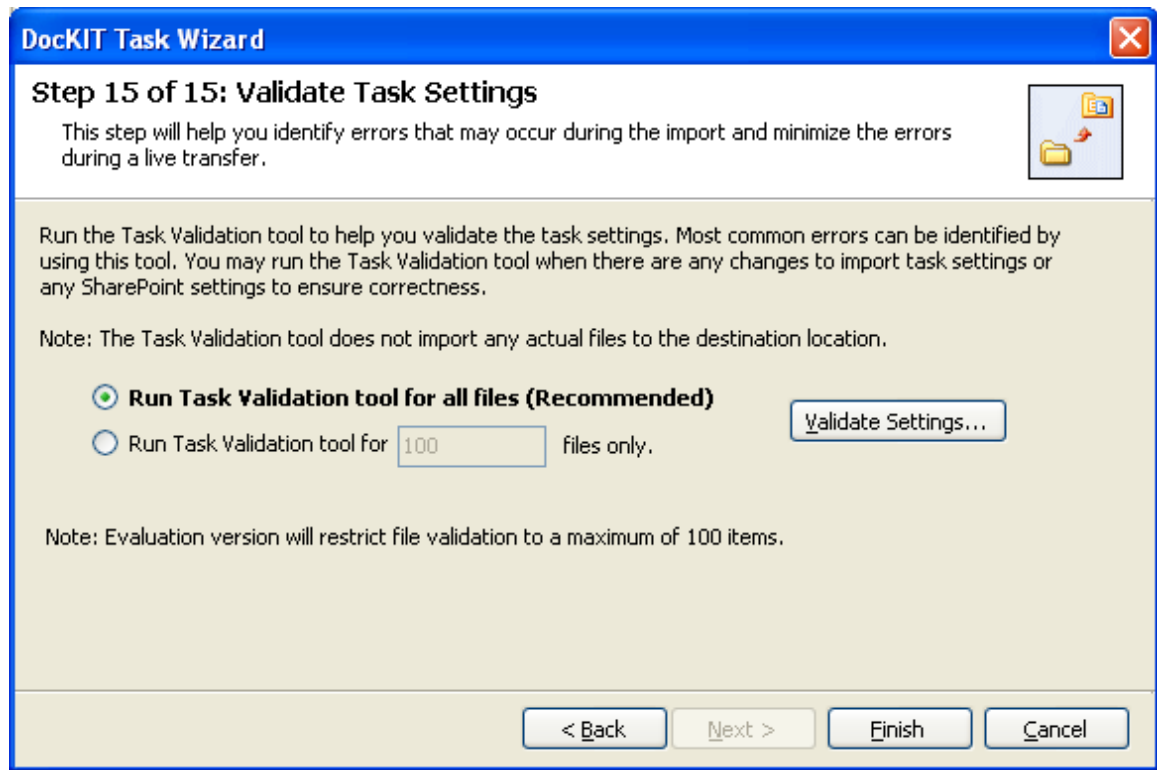
**User value format** can be in any one of the following formats:

Login name: Login name of the user in domain\username format e.g.,  
DocKITDomain\user1

Display Name: Display name of the user e.g., John Doe

E-mail address: E-mail address of the user in [someone@example.com](mailto:someone@example.com) format

10. You can use **Step 15 of 15: Validate Task Settings** step in DockIT Task Wizard to validate the task and avoid common errors.








Please see respective help section depending on the task type to get more information about Task Validation Tool.

11. Click **Finish** to run.

## 6.16. How to move source files to target location

The 'Move Files' tool will help you to move the already imported source files and folders to the specified location. You can filter the files to be moved to the target location by specifying appropriate file options available in the tool.

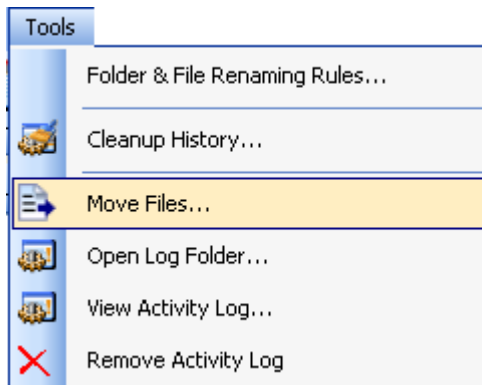
1. Select an item from Task History Pane.

Task History			
 Refresh  Move Files  Re-import  View Activity Log  Remove			
Start Time	End Time	Elapsed Time	Remarks
5/30/2008 2:09:28 PM	5/30/2008 2:11:14 PM	00:01:45	Incomplete: refer activity log
5/30/2008 11:32:51 AM	5/30/2008 11:33:08 AM	00:00:16	Completed successfully

2. Click **Move Files** from DockKIT main screen

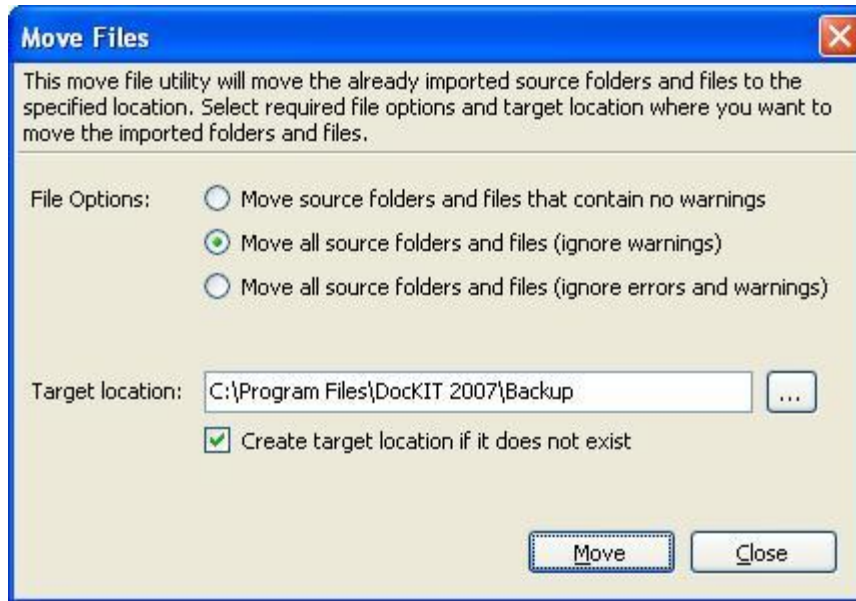


Or Select **Move Files** from **Tools** menu




3. The **Move Files** dialog appears as shown below.

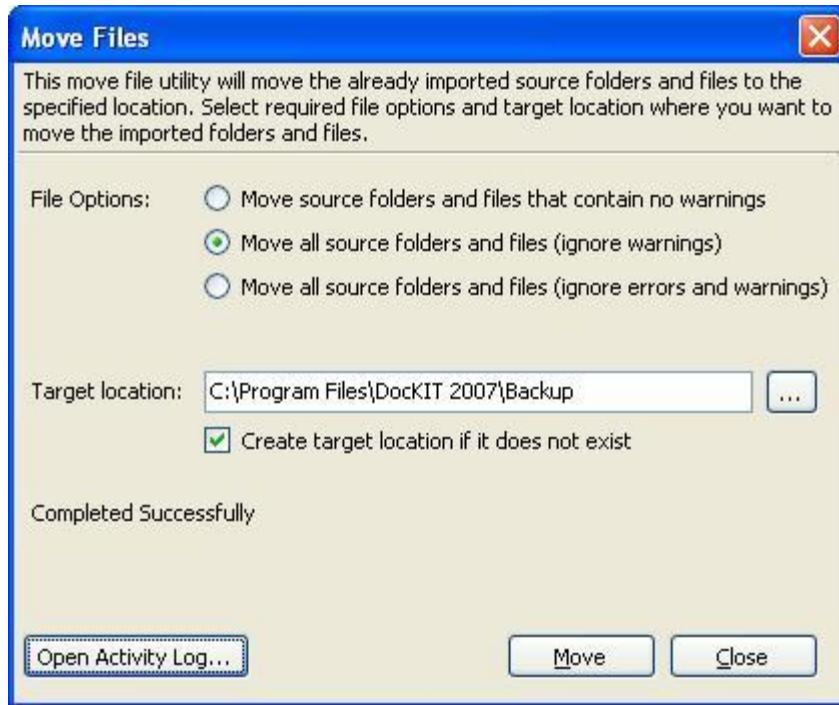




4. Select **File Options** given below
  1. **Move source folders and files that contain no warnings** - Move source folders and files that were imported without any warnings.
  2. **Move all source folders and files (ignore warnings)** - Move source folders and files that were imported, but warnings may be reported in the 'File Errors' tab of the Activity Log Viewer dialog.
  3. **Move all source folders and files (ignore errors and warnings)** - Move all source folders and files that were used to import. This option will move all the files regardless of their errors and warnings caused while importing into SharePoint.
5. Specify a **Target Location** where the source folders and files are to be moved. You can also click browse ('...') button to launch folder browser dialog.

 **Note:** Ensure that the user who invokes move process has sufficient permissions to delete folders and files in the source location and create them in the target location.

6. Select the checkbox **Create target location if it does not exist** if you like tool to create the folder structure and proceed with the move.
7. Click **Move** button to commence the move process.



Once the move process is complete, click **Open Activity Log** to show the activity log file using notepad application.

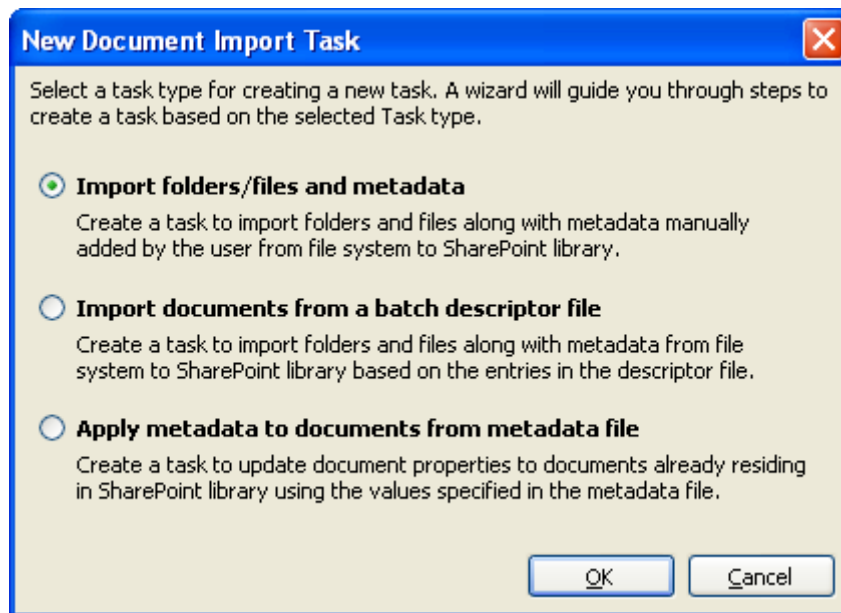
## 7) *Import folders / files and metadata*

### 7.1. Create Task

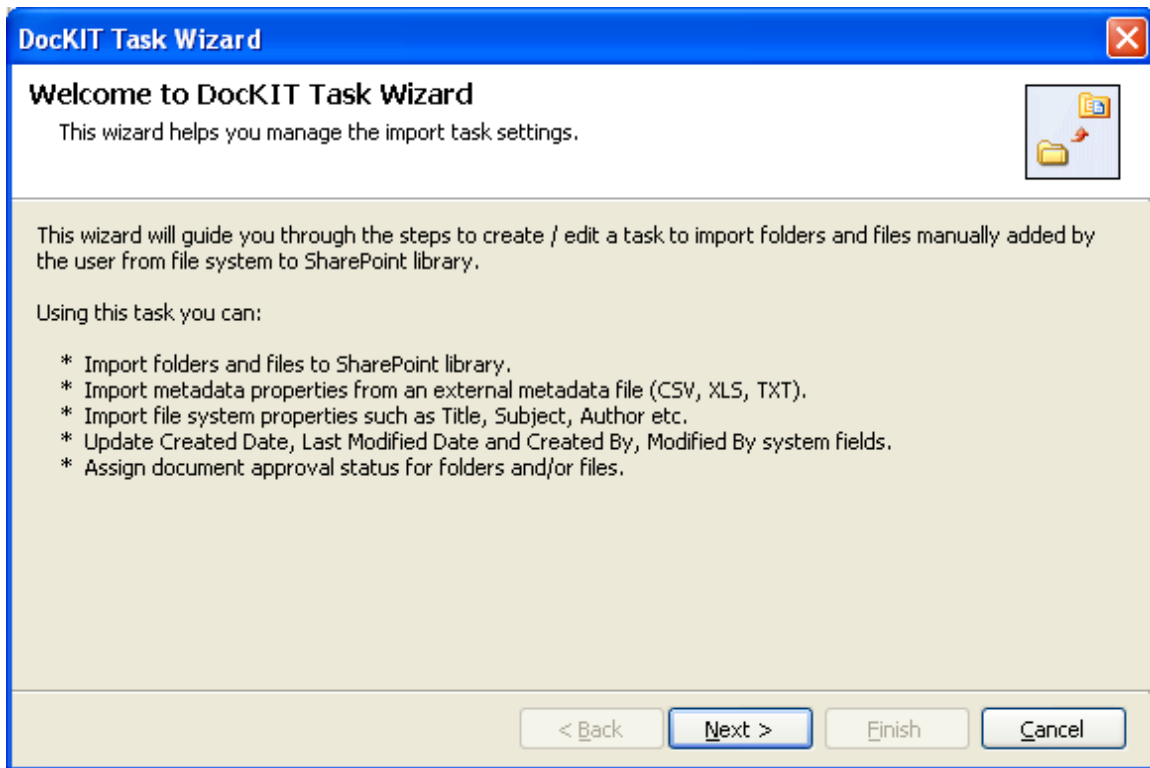
---

To create a task to import folders and files along with metadata from File System to SharePoint Library:

1. Select **Import folders / files and metadata** option in **New Document Import Task** dialog as shown below and click **OK**.



2. The **DockIT Task Wizard** appears as shown below



3. Click **Next** button
4. Specify [Metadata Options](#)
5. Specify [File System Properties](#)
6. Specify [System Dates](#)
7. Specify [System Users](#)
8. Specify [Content Type Settings](#)
9. Specify [Content Approval Status](#)
10. Specify [Rename folders and files](#)
11. Specify [Folder Options](#)
12. Specify [File Settings](#)
13. Specify [Import Conditions](#)
14. Specify [Document Status](#)
15. Specify [Task Settings](#)
16. Specify [Validate Task Settings](#)

17. Click **Finish** button to create the task, or click **Back** button to change the task settings.

### 7.1.1. Metadata Options

To specify the external metadata file to use to assign document properties in SharePoint:

1. The Metadata Options step appears as shown below:

**DocKIT Task Wizard**

**Step 3 of 15: Metadata Options**

Specify metadata file to use to update document properties in SharePoint.

File Name:  ...

Sheet Name:  View... Clear

Metadata columns to import:

- ☒ Do not import metadata values
- ☐ Import all columns
- ☐ Import selected columns only
- ☐ Ignore selected columns

Metadata columns in file:

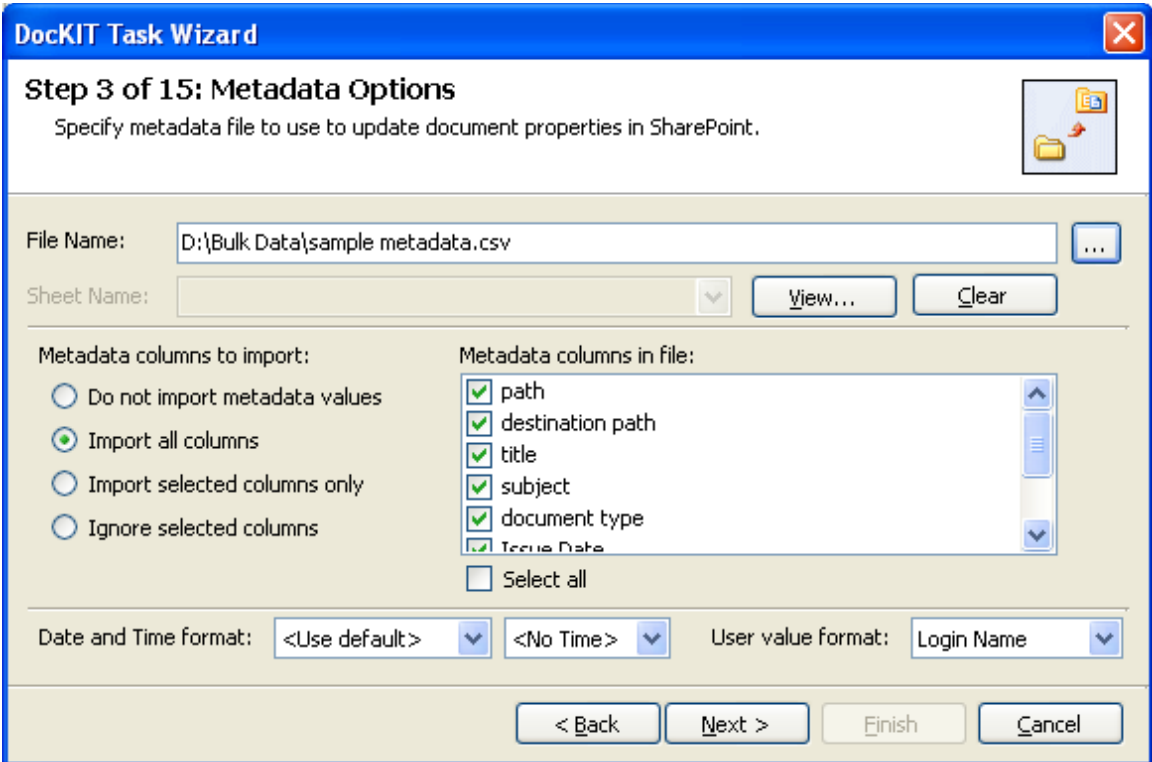
☐ Select all

Date and Time format: <Use default> <No Time> User value format: Login Name

< Back Next > Finish Cancel

2. **Click (...)** button to specify the external metadata file. The metadata file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLS) or Text file (TXT).
3. The external metadata file will automatically be extracted once the file name is specified. If you are using a Microsoft Excel based metadata file, then select the sheet name to use from the drop-down.
4. In order to move the source folders and files to the specified location after completing import process, click [Move Options...](#) for more information
5. Specify the **Metadata columns to import** by choosing one of the options given below:
  - a) **Do not import metadata values** - No columns will be imported
  - b) **Import all columns** - All columns available in the metadata file will be imported
  - c) **Import selected columns only** - Selected columns only will be imported
  - d) **Ignore selected columns** - All columns will be imported, except the selected columns
6. **Select** required columns from the metadata file to be updated in SharePoint based on the selected option in step 4.

7. Specify **Date and Time format** for the date fields in the metadata file. If the columns selected to import contain date and time values, specify the date mask to parse the date values. The default value is the current system settings.

8. 

Click **Next** to proceed.

### 7.1.2. File System Properties

---

DockKIT imports the file properties of documents available in the 'Summary' tab of file properties as seen in Windows Explorer / MS Office. SharePoint automatically propagates custom properties of MS-Office documents, namely, MS-Word, MS-Excel and MS-PowerPoint.

DockKIT updates the File System Properties in the respective SharePoint site columns. DockKIT automatically maps the file system properties with their respective SharePoint site columns internal names in their respective SharePoint language. Hence, the system site columns have to be included in the SharePoint library for the file system properties to be updated correctly.

To include the Site Columns to a SharePoint library: [Site Name] --> [Library Name] --> Settings --> Add Columns from Site Columns

The table below summarizes the default Site Columns that are updated by DockKIT:

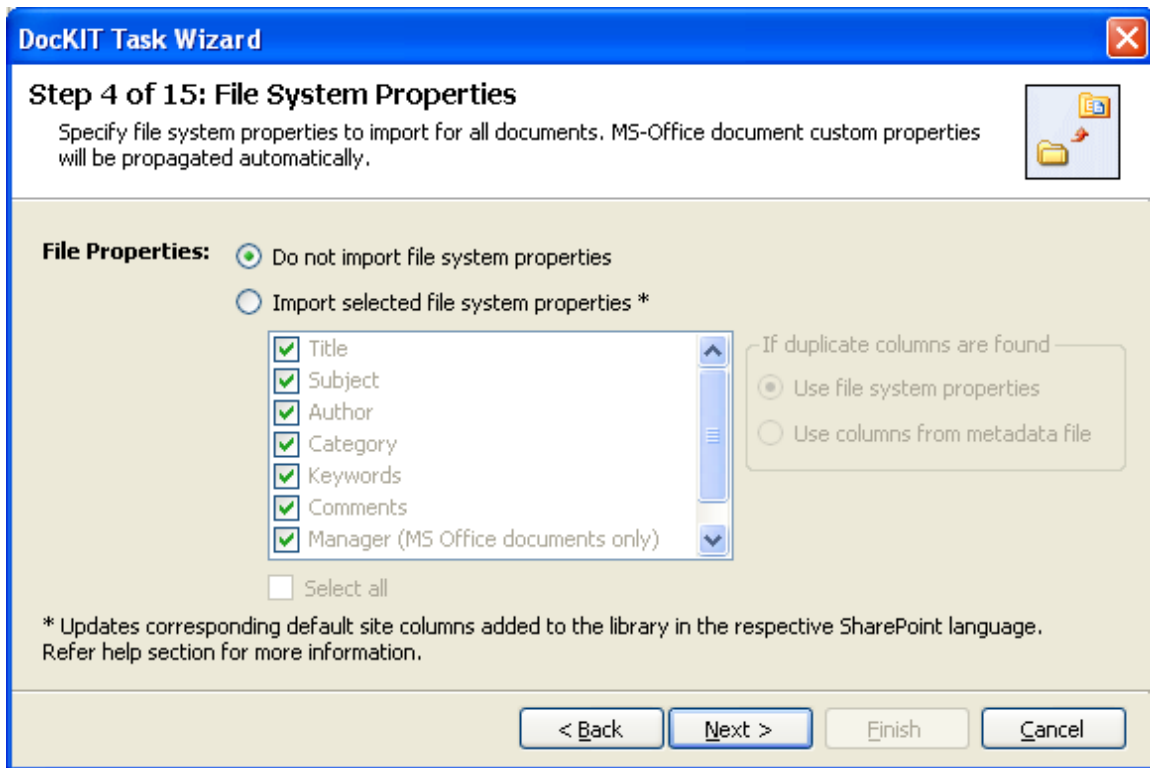
SharePoint Group Name	SharePoint Column Name
Core Document Columns	Subject
	Author
	Category
	Comments
	Keywords
Core Contact and Calendar Columns	Company
	Manager's Name

When importing Microsoft Office 2007 documents (Open XML documents) with their File System Properties, please ensure the machine running DockKIT has either Microsoft Office 2007 Suite or [Microsoft Office 2007 Compatibility Pack](#) is installed. In other words, you do not require these applications if you are not importing the file system properties of MS Office 2007 documents. DockKIT will not be able to update the respective site columns (will be left blank) in case this system requirement is not met.

To specify file system properties to import for documents, perform the steps given below:

1. The **File System Properties** step appears as shown below





2. Select any one of the following **File Properties** options given below:

- Do not import file system properties** - File properties will not be imported by DockIT. Please note that SharePoint will automatically propagate file system properties of MS-Office documents.
- Import selected file system properties** - Selected file system properties will be imported to SharePoint. Select the file system properties to import from the list box.

3.

**DocKIT Task Wizard**

**Step 4 of 15: File System Properties**

Specify file system properties to import for all documents. MS-Office document custom properties will be propagated automatically.

**File Properties:**

☐ Do not import file system properties

☒ Import selected file system properties \*

☒ Title

☒ Subject

☐ Author

☐ Category

☐ Keywords

☒ Comments

☒ Manager (MS Office documents only)

☐ Select all

**If duplicate columns are found**

☒ Use file system properties

☐ Use columns from metadata file

\* Updates corresponding default site columns added to the library in the respective SharePoint language. Refer help section for more information.

< Back   Next >   Finish   Cancel


4. In case there are any duplicates in column names available in the external metadata file and the file system properties (e.g., 'Author' column is available in the external metadata file and has been selected in the File System Properties screen), you have the option to specify, which value is to be used to update the SharePoint column:

- Use file system properties** - File properties' value will be taken for updating the respective SharePoint columns.
- Use columns from metadata file** - External metadata field's value will be taken for updating the respective SharePoint columns.

Click **Next** to proceed.

Also see: [Shrinking a SharePoint Content Database](#)

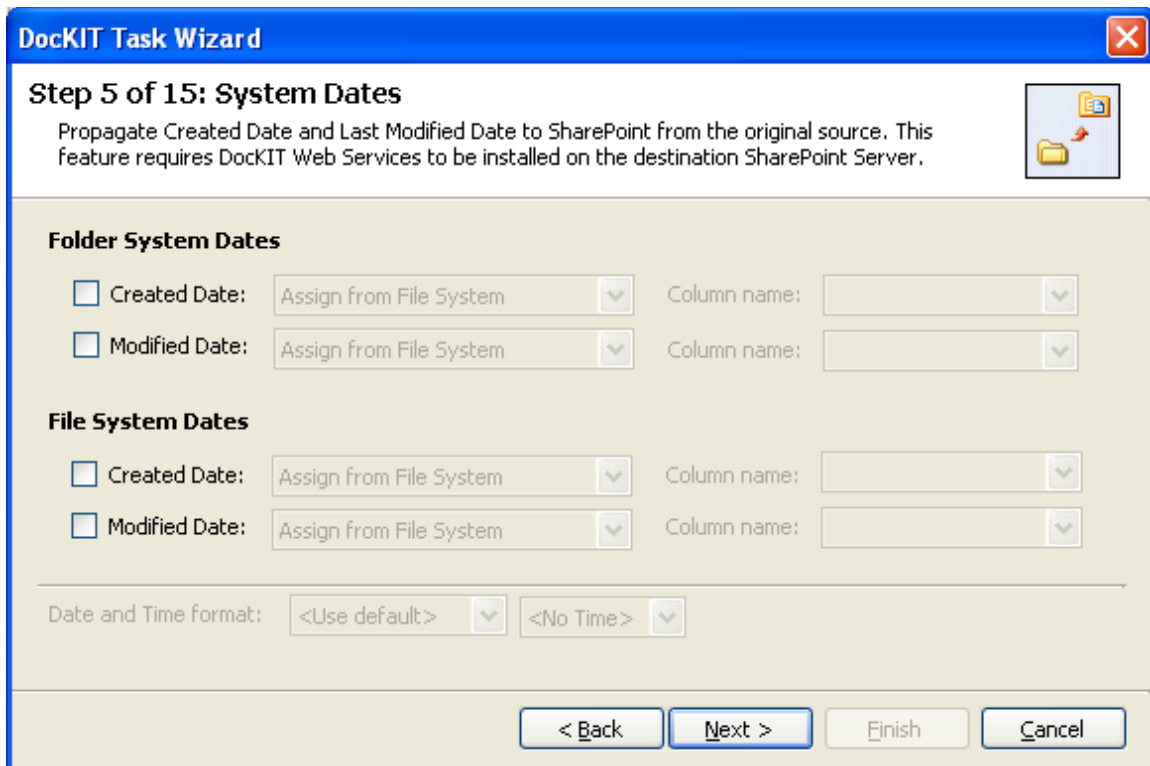
### 7.1.3. System Dates

 **Note:** [DockIT Web Services](#) must be installed in Windows Server 2003 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0 (32-bit or 64-bit platform) to activate this feature. Please ensure the user name specified in SharePoint Login dialog / user account specified in the Run As parameter in the scheduled task is a:

- Member of administrators group in the local server and remote SQL Server (or)
- Application pool user account (or)
- Owner of the site where the destination library resides

1. To specify System Dates (Created Date and Last Modified Date) to be assigned to the folder and file.

When DockIT connects to a DockIT Web Services enabled SharePoint site, the System Dates step will appear as shown in the screen below:



**DockIT Task Wizard**

**Step 5 of 15: System Dates**

Propagate Created Date and Last Modified Date to SharePoint from the original source. This feature requires DockIT Web Services to be installed on the destination SharePoint Server.

**Folder System Dates**

☐ Created Date: Assign from File System Column name:

☐ Modified Date: Assign from File System Column name:

**File System Dates**

☐ Created Date: Assign from File System Column name:

☐ Modified Date: Assign from File System Column name:

Date and Time format: <Use default> <No Time>

< Back Next > Finish Cancel

#### 2. Import Folder System Dates

You can assign the system date fields for folders. Select Created Date and Last Modified Date fields checkbox for folders as appropriate and select one of the Folder System Date options given below:

**Assign from file system** - DockIT will propagate the original Created Date and Last Modified Date fields as available in the file system (NTFS).

**Assign from metadata file** - The date fields can be assigned from the external metadata file by including the respective date field columns (e.g., CDate, LModDate) in the metadata file. This option allows each folder to have its own system dates. The date mask specified in Step 3: Metadata Options will be used to parse the date value. If the metadata value is unavailable, invalid or in case of any failure while parsing the date value, the current import time will be assigned automatically.

### 3. Import File System Dates

You can assign the system date fields for files. Select Created Date and Last Modified Date fields checkbox for files as appropriate and select one of the File System Date options given below:

**Assign from file system** - DockIT will propagate the original Created Date and Last Modified Date fields as available in the file system (NTFS).

**Assign from metadata file** - The date fields can be assigned from the external metadata file by including the respective date field columns (e.g., CDate, LModDate) in the metadata file. This option allows each file to have its own system dates. The date mask specified in Step 3: Metadata Options will be used to parse the date value. If the metadata value is unavailable, invalid or in case of any failure while parsing the date value, the current import time will be assigned automatically.

**Assign from custom property (MS-Office documents only)** - The date field values can also be assigned from the custom property of the MS-Office document. DockIT can assign the date fields from the custom property value of the respective MS-Office documents. Select the date mask from **Date and Time format** options to parse the date values taken from specified custom property. The default value is the current system settings. If the custom property value is unavailable, invalid or in case of any failure while reading the date value, the current import time will be assigned automatically.

4.

**DocKIT Task Wizard**

**Step 5 of 15: System Dates**

Propagate Created Date and Last Modified Date to SharePoint from the original source. This feature requires DocKIT Web Services to be installed on the destination SharePoint Server.

**Folder System Dates**

☒ Created Date: Assign from File System Column name: path

☒ Modified Date: Assign from File System Column name: path

**File System Dates**

☒ Created Date: Assign from metadata file Column name: Issue Date

☒ Modified Date: Assign from custom property Property name: Time Modified

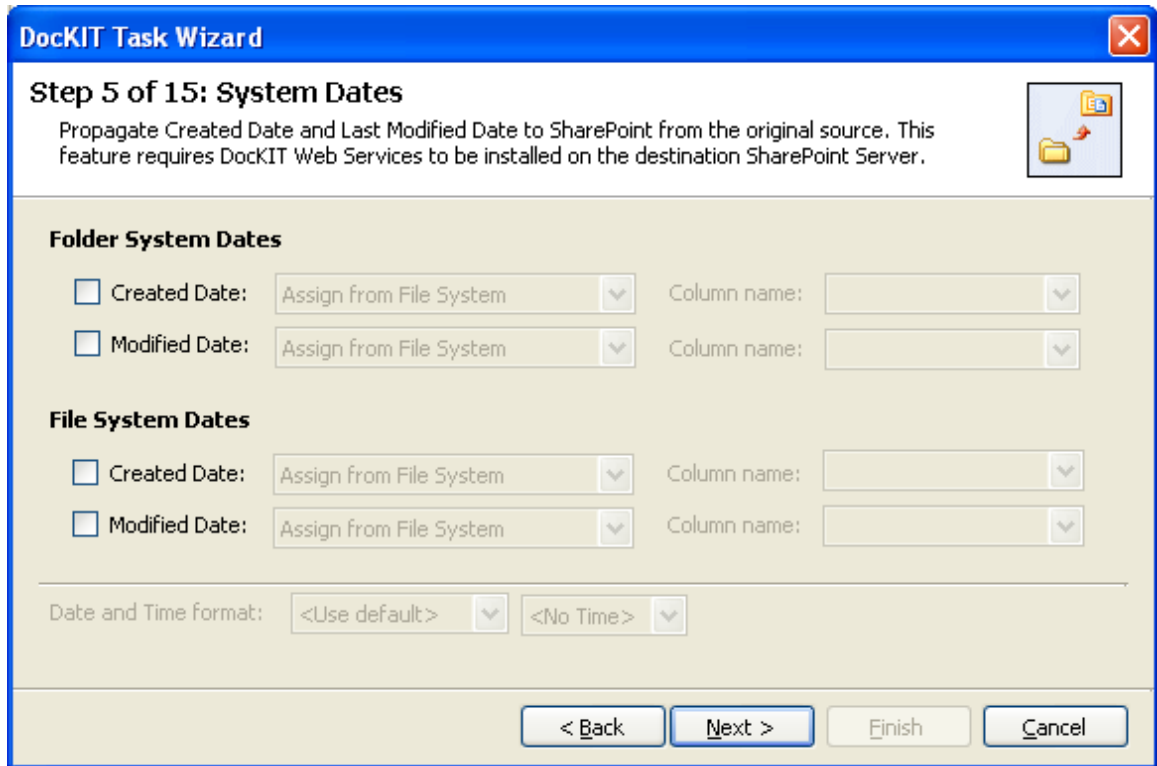
Date and Time format: <Use default> <No Time>

< Back Next > Finish Cancel

5. For more information, please visit Importing System Dates section in the help file.

Also see: [Shrinking a SharePoint Content Database](#)

6. If DocKIT connects to a SharePoint site that is not featured by DocKIT Web Services, the System Dates step will appear as shown below. You can ignore this step by clicking Next button. System Date fields will have the default date values (import time) assigned by SharePoint.



**DocKIT Task Wizard**

**Step 5 of 15: System Dates**

Propagate Created Date and Last Modified Date to SharePoint from the original source. This feature requires DocKIT Web Services to be installed on the destination SharePoint Server.

**Folder System Dates**

☐ Created Date: Assign from File System Column name:

☐ Modified Date: Assign from File System Column name:

**File System Dates**


☐ Created Date: Assign from File System Column name:

☐ Modified Date: Assign from File System Column name:

Date and Time format: <Use default> <No Time>

< Back Next > Finish Cancel

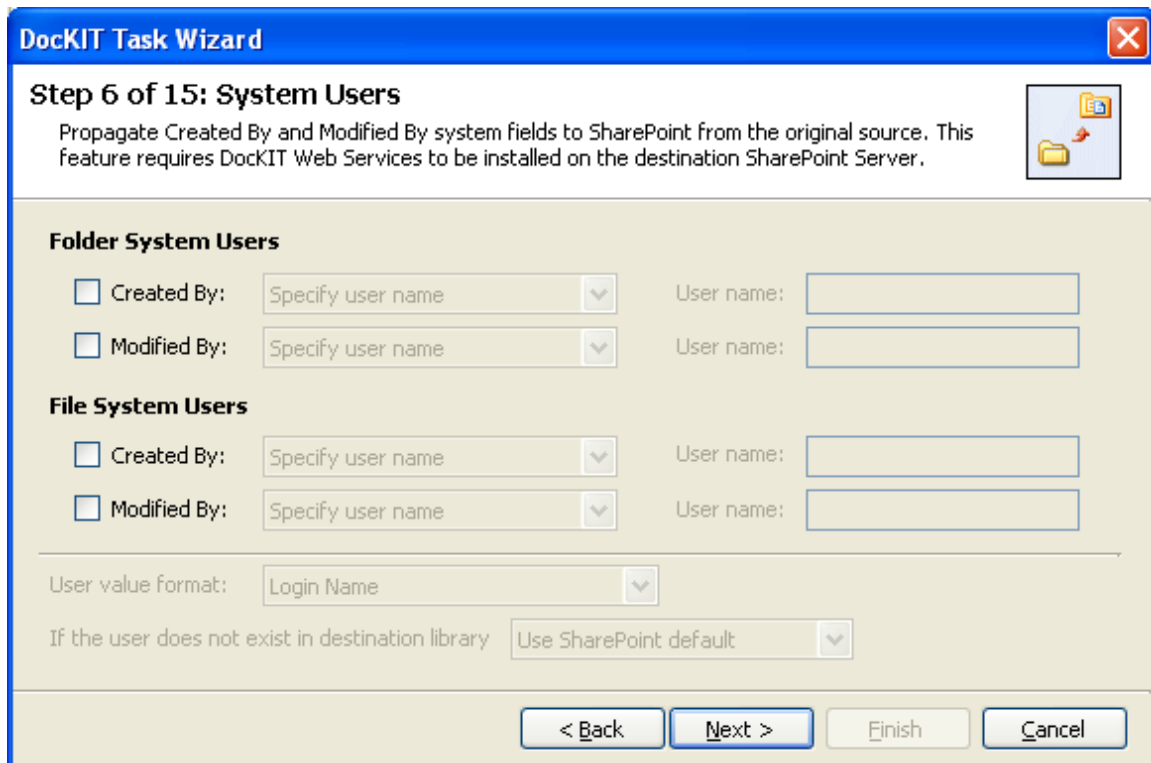
### 7.1.4. System Users

 **Note:** [DockIT Web Services](#) must be installed in Windows Server 2003 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0 (32-bit or 64-bit platform) to activate this feature. Please ensure the user name specified in SharePoint Login dialog / user account specified in the Run As parameter in the scheduled task is a:

- Member of administrators group in the local server and remote SQL Server (or)
- Application pool user account (or)
- Owner of the site where the destination library resides

1. To specify System Users (Created By and Modified By) to be assigned to the folder and/or file:

When DockIT connects to a DockIT Web Services enabled SharePoint site, the System Users step will appear as shown in the screen below:



2. **Import Folder System Users**

Select Created By and Modified By fields checkbox as appropriate and use one of the Folder System Users options given below, by which DockIT determines the source of system user values for the respective folder.

The user value can be the Login Name or Display Name or E-Mail address of the user. DockIT will search the site users list and assign the ID of the matching user to the People or Group column of the respective folder, only if the user name exists. Do not use multiple values.

**Specify user name** - The specified user value will be assigned to the respective user fields. Select the user value format from **User Value Format** option to search the User ID in the site users list for the specified user value. The default format of the user account is the user login name (DOMAIN\USER).

**Assign from metadata file** - The system users can also be assigned from the external metadata file by including the folder system users column names in the metadata file. This option allows each folder to have its own system users, so long as the stated user already exists in the SharePoint library. The user value format specified in Step 3: Metadata Options will be used to search the User ID in the site users list. If the metadata entry is not available, the current import user will be assigned automatically.

### 3. Import File System Users

Select Created By and Modified By fields checkbox as appropriate and use one of the File System User options given below, by which DockIT determines the source of system user values for the respective file.

The user value can be the Login Name or Display Name or E-Mail address of the user. DockIT will search the site users list and assign the ID of the matching the user to the People or Group column of the respective file, only if the user name exists. Do not use multiple values.

**Specify user** - The specified user value will be assigned to the respective user fields. Select the user value format from **User Value Format** options to search the User ID in the site users list for the specified user value. The default format of the user account is the user login name (DOMAIN\USER).

**Assign from metadata file** - The system users can also be assigned from the external metadata file by including the file system users column name in the metadata file. This option allows each file to have its own system users, so long as the stated user already exists in the SharePoint library. The user value format specified in *Step 3: Metadata Options* will be used to search the User ID in the site users list. If the metadata entry is not available, the current import user will be assigned automatically.

**Assign from custom property** - The system users can also be assigned from the custom property of an MS-Office document. DockIT can assign the system users from the custom property value of the respective documents. Select the user value format from **User Value Format** options to search the User ID in the site users list for the user values taken from specified custom property. The default format of the user account is the user login name (DOMAIN\USER).

4. Specify the action to be taken, if the specified user does not exist in the destination library:

**Do not import file** - DockIT will not import file if the user specified does not exist in the destination library.



**Use SharePoint default** - DocKIT will import file and system users will be the user account performing the import operation.

5.

**DocKIT Task Wizard**

**Step 6 of 15: System Users**

Propagate Created By and Modified By system fields to SharePoint from the original source. This feature requires DocKIT Web Services to be installed on the destination SharePoint Server.

**Folder System Users**

☒ Created By: Specify user name User name: adminuser

☒ Modified By: Assign from metadata file Column name: Editor

**File System Users**

☒ Created By: Assign from metadata file Column name: Author

☒ Modified By: Assign from custom property Property name: Editor

User value format: Display Name

If the user does not exist in destination library Use SharePoint default


< Back Next > Finish Cancel



**Note:**


- Created By user will be assigned / updated for the new files only. In other words, Created By user will not be assigned or modified for an already existing file or a new file version.
- While re-importing partially imported files, Created By user value will not be re-assigned to the required value once the file is imported into the SharePoint library.
- You can re-assign the system users value for folder after it was created in SharePoint.

6. If DocKIT connects to a SharePoint site that is not featured by DocKIT Web Services, the System Users step will appear as shown below. You can ignore this step by clicking Next button. System Users will have the default user values (import user account) assigned by SharePoint.


**DockIT Task Wizard** 


**Step 6 of 15: System Users**

Propagate Created By and Modified By system fields to SharePoint from the original source. This feature requires DockIT Web Services to be installed on the destination SharePoint Server.





**Folder System Users**


☐ Created By: Specify user name  User name:


☐ Modified By: Specify user name  User name:

**File System Users**

☐ Created By: Specify user name  User name:

☐ Modified By: Specify user name  User name:

User value format: Login Name 

If the user does not exist in destination library Use SharePoint default 

### 7.1.5. Content Type Settings

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To specify the content type to be assigned to the documents:

1. The Content Type Settings step appears as shown below:

**DocKIT Task Wizard**

**Step 7 of 15: Content Type Settings**  
Specify content type to be assigned to the folders and/or files.

**Folder Content Type Options**

☒ Use standard folder content type in the destination library

☐ Assign folder content type from Specific content type name  
Content type name:

**File Content Type Options**

☒ Use default file content type in the destination library

☐ Assign file content type from Specific content type name  
Content type name:

2. Specify the folder content type settings using one of the options given below:
- **Use standard folder content type in the destination library** - Default content type of the destination library will be assigned as content type for the entire folder.
  - **Specify the content type** - Specified content type value will be assigned to the folders. The default content type of the library will be assigned to the folders, if the content type specified in the textbox does not exist.
  - **Assign from metadata file** - The content type value can also be assigned from the external metadata file by including the content type column name in the metadata file. This option allows each folder to have its own content type, so long as the stated content type already exists in the SharePoint library. The default content type of the library will be assigned to the folders, if the content type specified in the metadata file does not exist.

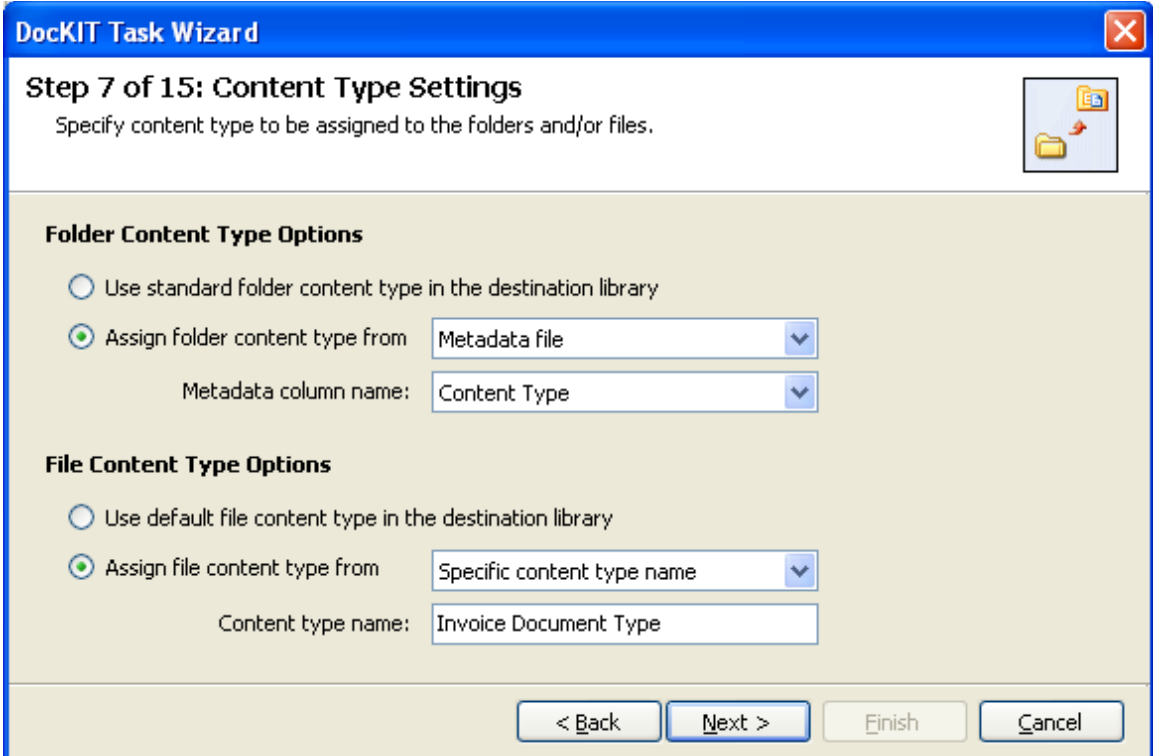
3. Specify the file content type settings using one of the options given below:

**Use default content type in the destination library** - Default content type of the destination library will be assigned as content type for all the documents.

**Specify the content type** - Specified content type value will be assigned to the documents. The default content type of the library will be assigned to the documents, if the content type specified in the textbox does not exist.

**Assign from metadata file** - The content type value can also be assigned from the external metadata file by including the content type column name in the metadata file. This option allows each document to have its own content type, so long as the stated content type already exists in the SharePoint library. The default content type of the library will be assigned to the documents, if the content type specified in the metadata file does not exist.


**Assign from custom property** - The content type value can also be specified by the custom property name of the file. DockKIT can have the content type value from custom property value of the respective file. This option also allows each document to have its own content type, so long as the stated content type already exists in the SharePoint library. The default content type of the library will be assigned to the documents, if the content type specified in the metadata file does not exist.

4. 

5. Click **Next** to proceed.

Also see: [Shrinking a SharePoint Content Database](#)

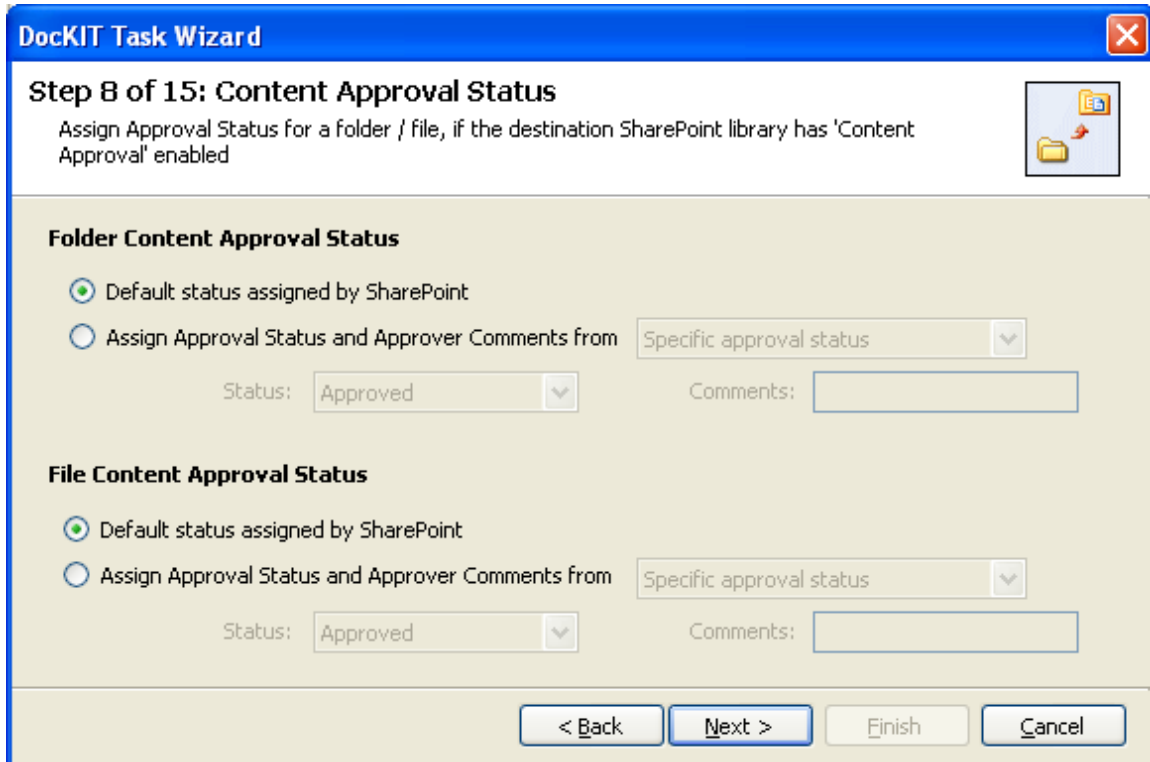
### 7.1.6. Content Approval Status

 **Note:** DocKIT Web Services must be installed in Windows Server 2003 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0 (32-bit or 64-bit platform) to activate this feature. Please ensure the user name specified in SharePoint Login dialog / user account specified in the Run As parameter in the scheduled task is a:

- Member of administrators group in the local server and remote SQL Server (or)
- Application pool user account (or)
- Owner of the site where the destination library resides

To specify the content approval status to be set after importing a folder / file to a SharePoint library:

1. The Content Approval Status step will appear as shown in the screen below:



2. Specify the folder content approval status options using one of the options given below:

**Default status assigned by SharePoint** - Default Approval Status (e.g., Pending or Draft) will be assigned as Approval Status automatically by SharePoint for all imported folders.

**Assign Approval Status as** - Specified approval status value will be assigned to the folder. You can specify the approval status - Approved, Rejected, Pending, Draft and Scheduled from the dropdown list. You can also specify the approval status comments that must be assigned to the folder (Optional).

**Assign Approval Status from metadata file** - The approval status value can also be assigned from the external metadata file by including the approval status column name in the metadata file. This option allows each folder to have its own approval status, so long as the stated approval status is valid status (Approved, Rejected, Pending, Draft and Scheduled) in the SharePoint library. The default approval status of the library will be assigned to the folder, if the approval status specified in the metadata file is invalid. The approval status comments can also be assigned from the external metadata file by including the approval status comments column name in the metadata file (Optional).



**Note:** The Content Approval Status will be assigned only if the destination library has Content Approval enabled.

3. Specify the file content approval status options using one of the options given below:

**Default status assigned by SharePoint** - Default Approval Status (e.g., Pending or Draft) will be assigned as Approval Status automatically by SharePoint for all imported files.

**Assign Approval Status as** - Specified approval status value will be assigned to the file. You can specify the approval status - Approved, Rejected, Pending, Draft and Scheduled from the dropdown list. You can also specify the approval status comments that must be assigned to the file (Optional).

**Assign Approval Status from metadata file** - The approval status value can also be assigned from the external metadata file by including the approval status column name in the metadata file. This option allows each file to have its own approval status, so long as the stated approval status is valid status (Approved, Rejected, Pending, Draft and Scheduled) in the SharePoint library. The default approval status of the library will be assigned to the file, if the approval status specified in the metadata file is invalid. The approval status comments can also be assigned from the external metadata file by including the approval status comments column name in the metadata file (Optional).

**Assign Approval Status from custom property** - The approval status value can also be specified by the custom property name of the file. DockKIT can have the approval status value from custom property value of the respective file. The approval status comments can also be assigned from the custom property value of the respective file by specifying the approval status comments property name (Optional).



**Note:** The Content Approval Status will be assigned only if the destination library has Content Approval enabled.

4.

**DocKIT Task Wizard**

**Step 8 of 15: Content Approval Status**  
Assign Approval Status for a folder / file, if the destination SharePoint library has 'Content Approval' enabled

**Folder Content Approval Status**

☐ Default status assigned by SharePoint

☒ Assign Approval Status and Approver Comments from Specific approval status

Status: Approved Comments: sample comments

**File Content Approval Status**

☐ Default status assigned by SharePoint

☒ Assign Approval Status and Approver Comments from Custom properties

Status property: Life cycle status Comments property: Life cycle comments

< Back Next > Finish Cancel

5. Click **Next** to proceed.

### 7.1.7. Rename folders and files

To specify naming rules for both folders and files to rename invalid characters in SharePoint to a valid folder / file name:

1. The **Rename folders and files** wizard step appears as shown below:

**DockIT Task Wizard**

**Step 9 of 15: Rename folders and files**

SharePoint does not permit certain characters in folder and file names. Specify rule to use for folder and/or file. Specify max length for folder / file names.

☒ Do not apply naming rule

☐ Apply folder / file naming rules

Rule to use for folder names: None

Rule to use for file names: None

Note: Use 'Folder & File Renaming Rules...' in Tools menu to create the naming rules.

**Truncate folder / file names**


☐ Maximum allowed folder name length: 128 characters.

☐ Maximum allowed file name length: 128 characters.

< Back   Next >   Finish   Cancel

2. Select any one of the following options:

- **Do not apply naming rules** - No naming rules will be applied
- **Apply folder / file naming rules** - Specified rules will be applied for file and folder names. Select the rule name available in dropdown for both file and folder names.

 **Note:** To create or edit a naming rule, click **Tools** and select Folder and File Renaming Rules...



3.

**DocKIT Task Wizard**

**Step 9 of 15: Rename folders and files**

SharePoint does not permit certain characters in folder and file names. Specify rule to use for folder and/or file. Specify max length for folder / file names.

☐ Do not apply naming rule

☒ Apply folder / file naming rules

Rule to use for folder names: sample rule1

Rule to use for file names: sample rule2

Note: Use 'Folder & File Renaming Rules...' in Tools menu to create the naming rules.

Truncate folder / file names

☒ Maximum allowed folder name length: 45 characters.

☒ Maximum allowed file name length: 30 characters.

< Back Next > Finish Cancel

4. **Truncate folder / file names:**

Truncate long folders and file names by specifying the folder and file length to use before importing them to a SharePoint library. DocKIT leaves the source folder / file name as-is and truncates them before importing them to SharePoint.

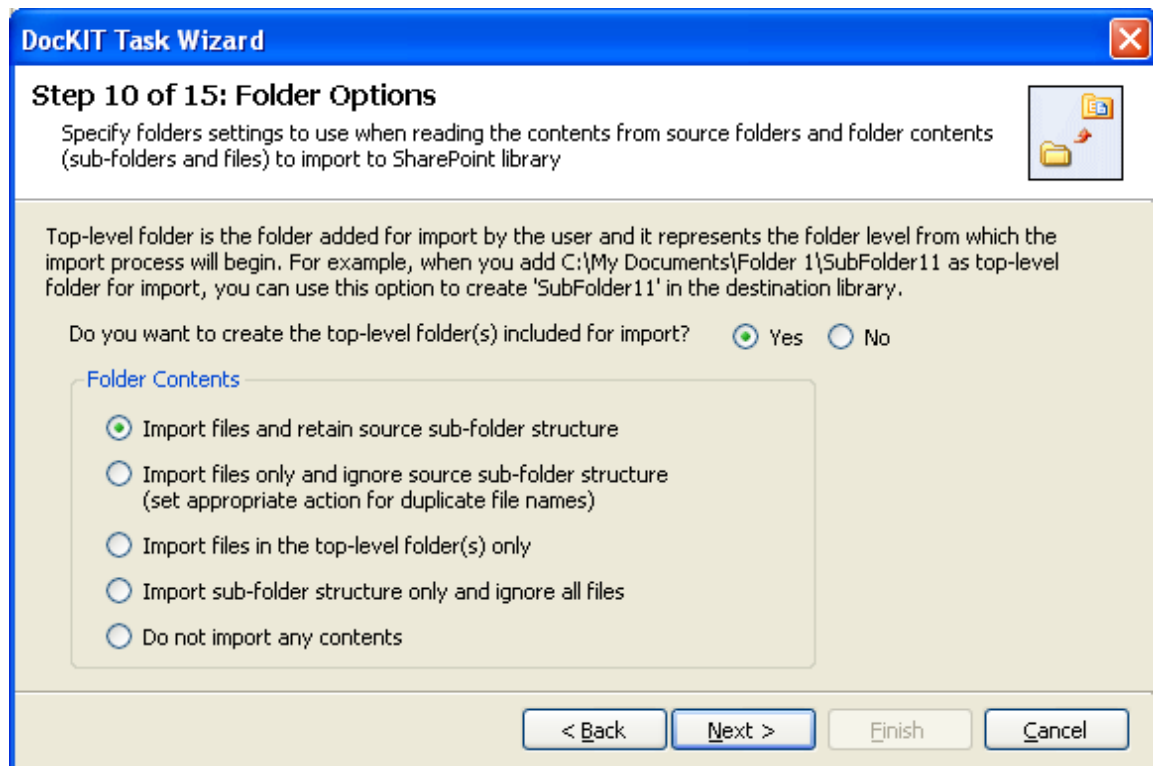
Select appropriate checkbox for folder / file and enter a valid character length for folder and file.

5. Click **Next** to proceed.


### 7.1.8. Folder Options

To make the import process easier for users, DockKIT provides an ability to specify the contents to import from the source folder structure. To specify the folder settings to use in the destination SharePoint library and the necessary files to import, perform the steps as given below:

1. The Folder Options step appears as shown below:



2. The top-level folder is the folder added or specified for import by the user. DockKIT will commence the import process from this top-level folder. Select the appropriate option to create the top-level folder by selecting the option buttons (Yes/No).
3. Select any of the following folder options given below to specify the contents to be imported from the source folders in file system:
  - a) **Import files and retain source sub-folder structure** - This option imports folders and files exactly as they are in source file system. The source folder structure in the file system will be retained in the destination location.
  - b) **Import files only and ignore source sub-folder structure** - This option imports files only and ignore its source folder structure in the file system.

 **Note:** Specify the appropriate options in [File Settings](#) step to handle situations where same filenames may be available for more than one file in different source folder hierarchy (sub-folders).

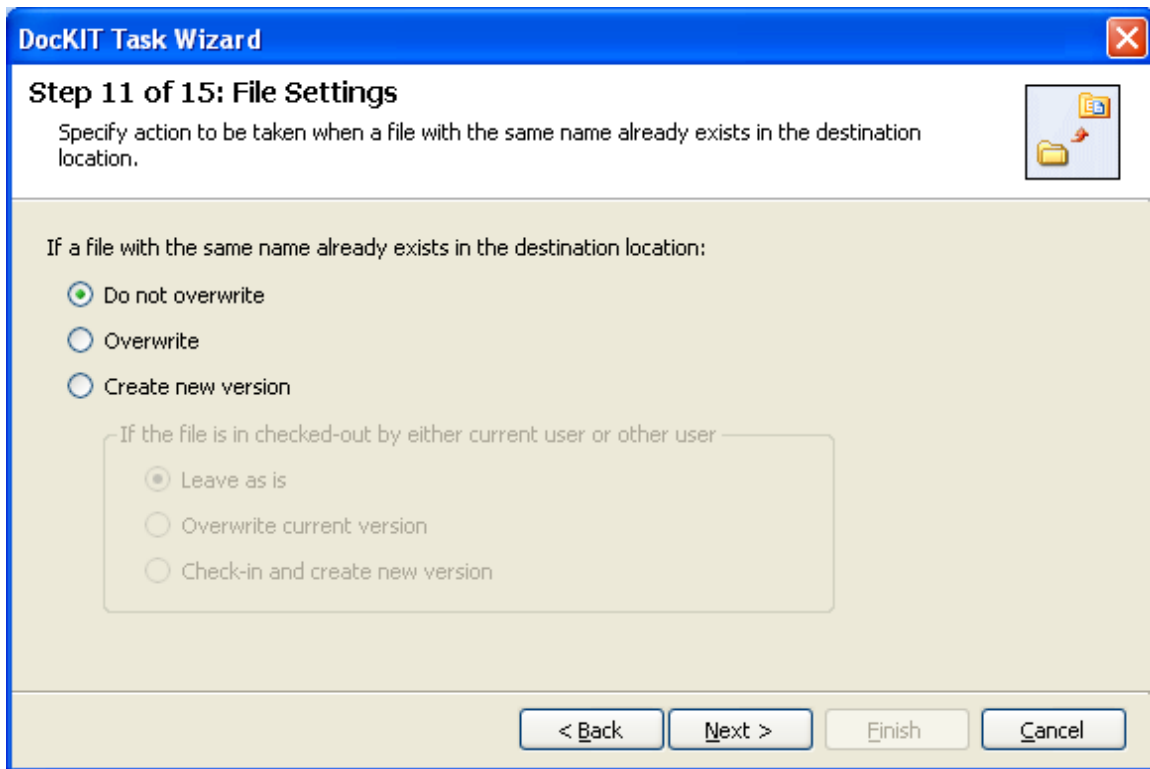
- c) **Import files in the top-level folders only** - This option imports files available in the top-level folders only. DockIT will not traverse the sub-folders within the top level folders.
  - d) **Import sub-folder structure only and ignore all files** - This option creates the sub-folder structure in the destination location and ignores all files that are available within the added folder and sub-folders.
  - e) **Do not import any contents** - This option does not import any contents (sub-folders and files) from the source folder added for import. This option will be useful when you want to create the top-level folder only and ignore all its contents.
4. Click **Next** to proceed.

### 7.1.9. File Settings

---

To specify the action to be taken by DockIT when a file with the same name already exists in the destination location:

1. The File Settings step appears as shown below:



2. Select any one of the following options given below:
  - a) **Do not overwrite** - Skips the file without overwriting.
  - b) **Overwrite file** - Deletes the file from the destination location (along with its version history) and imports the source file.
  - c) **Create new version** - Adds the source file as new version at the destination location. Select any one of the following options to instruct DockIT what to do if the destination file is checked-out by either current user or another user:
    - I. **Leave as is** - Skip the file.
    - II. **Overwrite current version** - Undo Checkout the file and add the source file as new version.
    - III. **Check-in file & create new version** - Check-in the file and add the source file as a new version.

**DocKIT Task Wizard**

**Step 11 of 15: File Settings**

Specify action to be taken when a file with the same name already exists in the destination location.

If a file with the same name already exists in the destination location:

- ☐ Do not overwrite
- ☐ Overwrite
- ☒ Create new version

If the file is in checked-out by either current user or other user

- ☐ Leave as is
- ☐ Overwrite current version
- ☒ Check-in and create new version

< Back   Next >   Finish   Cancel

Click Next to proceed.

### 7.1.10. Import Conditions

DockIT imports folders and files along with metadata to SharePoint library based on certain import conditions. Import conditions can be created using metadata columns and values (from external metadata file), file system properties and file information (created date, modified date and file extension).

1. The Import Conditions step appears as shown below:

**DockIT Task Wizard**

**Step 12 of 15: Import Conditions**

Specify import conditions to be satisfied for folders / files to be imported to SharePoint.

☒ Do not apply any import conditions ☐ Apply the following import conditions

Field Name Operator Value

Add to Filter 'OR' to Filter

Conditions:

Import folder / file if the above conditions are: ☒ satisfied ☐ not satisfied

< Back Next > Finish Cancel

2. Select any one of the following options given below:

- **Do not apply any import conditions** - No import conditions will be used to filter folders / files
- **Apply the following import conditions** - The import conditions specified will be used to filter folders / files taken for import into SharePoint

3. The wizard step appears as shown below:

**DocKIT Task Wizard**

**Step 12 of 15: Import Conditions**

Specify import conditions to be satisfied for folders / files to be imported to SharePoint.

☐ Do not apply any import conditions ☒ Apply the following import conditions

Field Name Operator Value

Add to Filter 'OR' to Filter

Conditions:

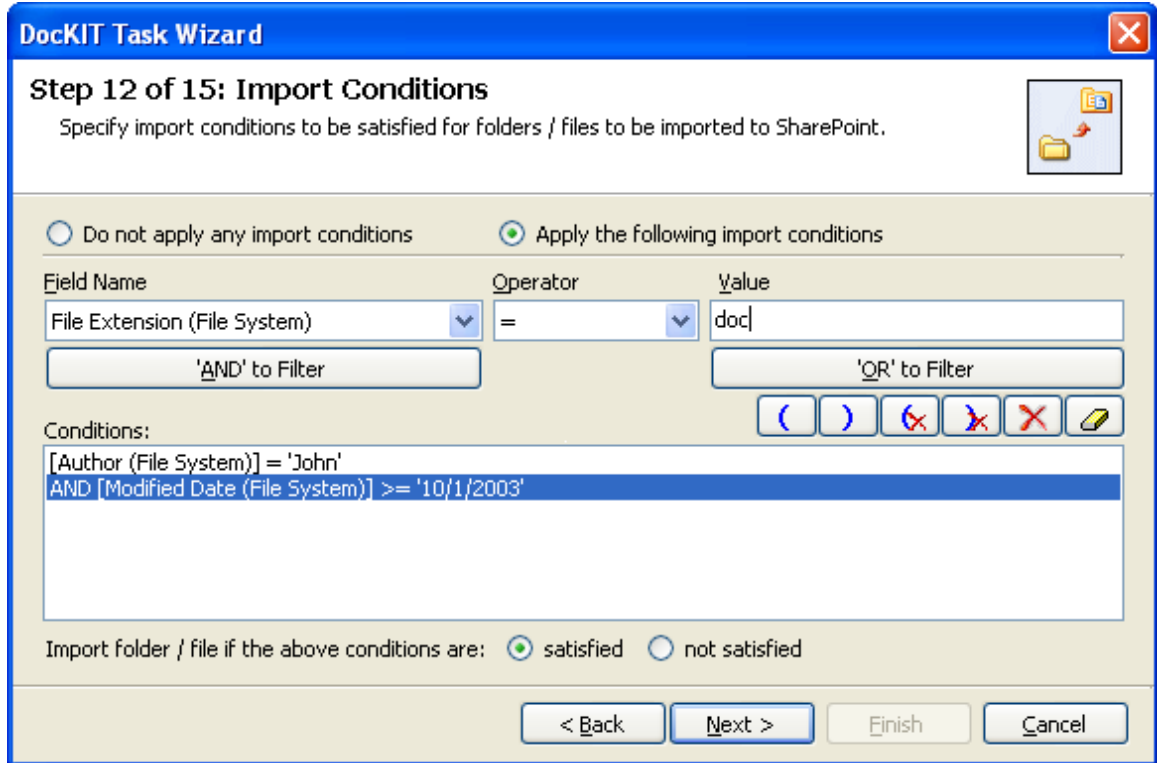
Import folder / file if the above conditions are: ☒ satisfied ☐ not satisfied

< Back Next > Finish Cancel

You can specify the import conditions by selecting the field name and by specifying a corresponding value with the necessary operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

4. DocKIT can import the folders / files that satisfy the import conditions or import the folders / files that do not satisfy the import conditions specified in the step above. Use the appropriate action to follow using the options given below:
- 1) Import folder / file if the above conditions are satisfied - Folders / Files that satisfy the condition will be marked for import.
  - 2) Import folder / file if the above conditions are not satisfied - Folders / Files that do not satisfy the condition will be marked for import.

5.



**DocKIT Task Wizard**

**Step 12 of 15: Import Conditions**

Specify import conditions to be satisfied for folders / files to be imported to SharePoint.

☐ Do not apply any import conditions ☒ Apply the following import conditions

Field Name	Operator	Value
File Extension (File System)	=	doc

Conditions:

[Author (File System)] = 'John'  
AND [Modified Date (File System)] >= '10/1/2003'

Import folder / file if the above conditions are: ☒ satisfied ☐ not satisfied

Click **Next** to proceed.

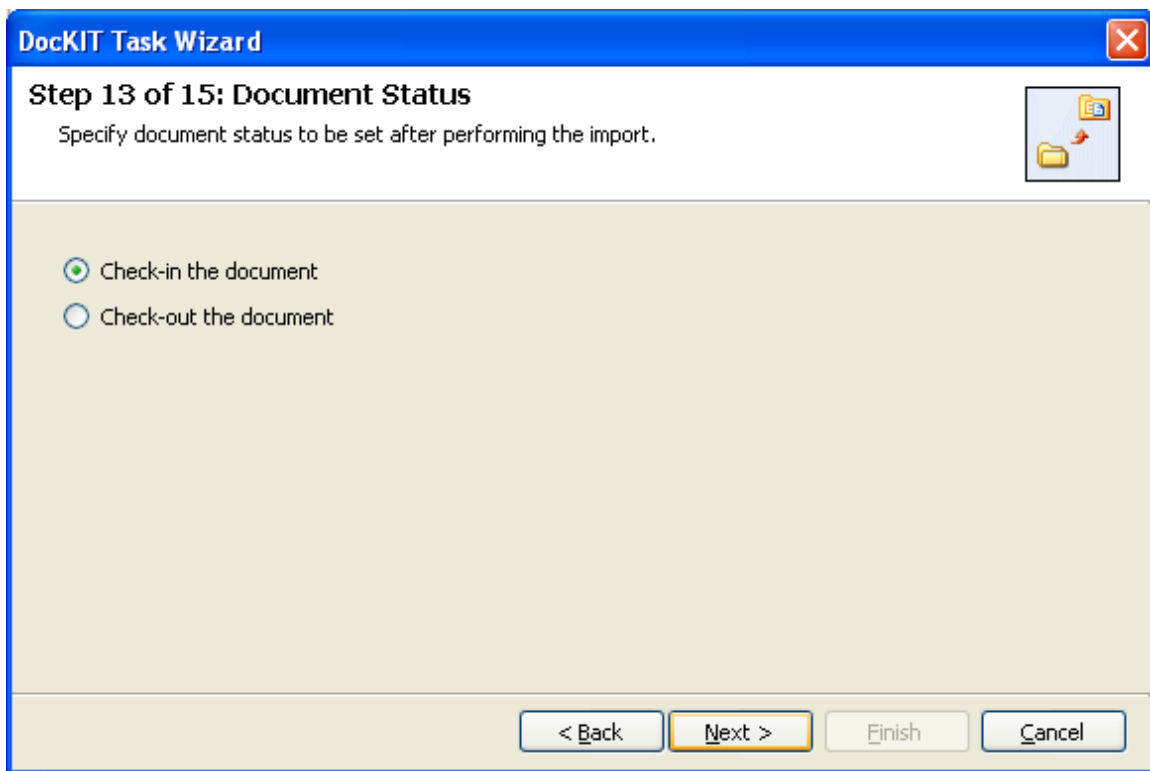


### 7.1.11. Document Status


---

To specify the document status to be set after performing the import to a SharePoint library:

1. The Document Status step appears as shown below:



2. Select any of the following options:
  - a) Check-in the document - after performing the import, the document will be in checked-in state.
  - b) Check-out the document - after performing the import, the document will be in checked-out state.

 **Note:** The versions created by the document status settings will be affected by the library settings (Require check-out to edit the documents)

3. Click **Next** to proceed.

### 7.1.12. Task Settings

---

To specify the task name and schedule settings for the DockIT import task, perform the steps given below.

1. The Task Settings step appears as shown below:

**DockIT Task Wizard**

**Step 14 of 15: Task Settings**

Enter a unique name for the import task and specify schedule task settings.

**Task Name:**

**Task Option:** ☒ Run task upon clicking Finish button ☐ Run later ☐ Create Schedule Task

**Run As:**

**Schedule:**

**Schedule Task Daily**

Every  day(s)

At 5:57 PM every day, starting 3/29/2007

2. Enter a unique task name in **Task Name** textbox.
3. Select a **Task Option** from one of the following options:
  - a) **Run task upon clicking Finish button** - to run the task immediately after clicking Finish button
  - b) **Run later** - to run the task later as and when desired
  - c) **Create Schedule task** - to create a Windows scheduled task. DockIT will create a schedule task in the Windows Scheduled Tasks with the given settings. DockIT will perform the import based on the Run As user account specified in this step. The Run As account should be a valid Windows domain account.

**DocKIT Task Wizard**

**Step 14 of 15: Task Settings**

Enter a unique name for the import task and specify schedule task settings.

Task Name:

Task Option: ☐ Run task upon clicking Finish button ☐ Run later ☒ Create Schedule Task

Run As:

Schedule:  Start time:

Schedule Task Daily

Every  day(s)

At 1:50 PM every day, starting 10/3/2007

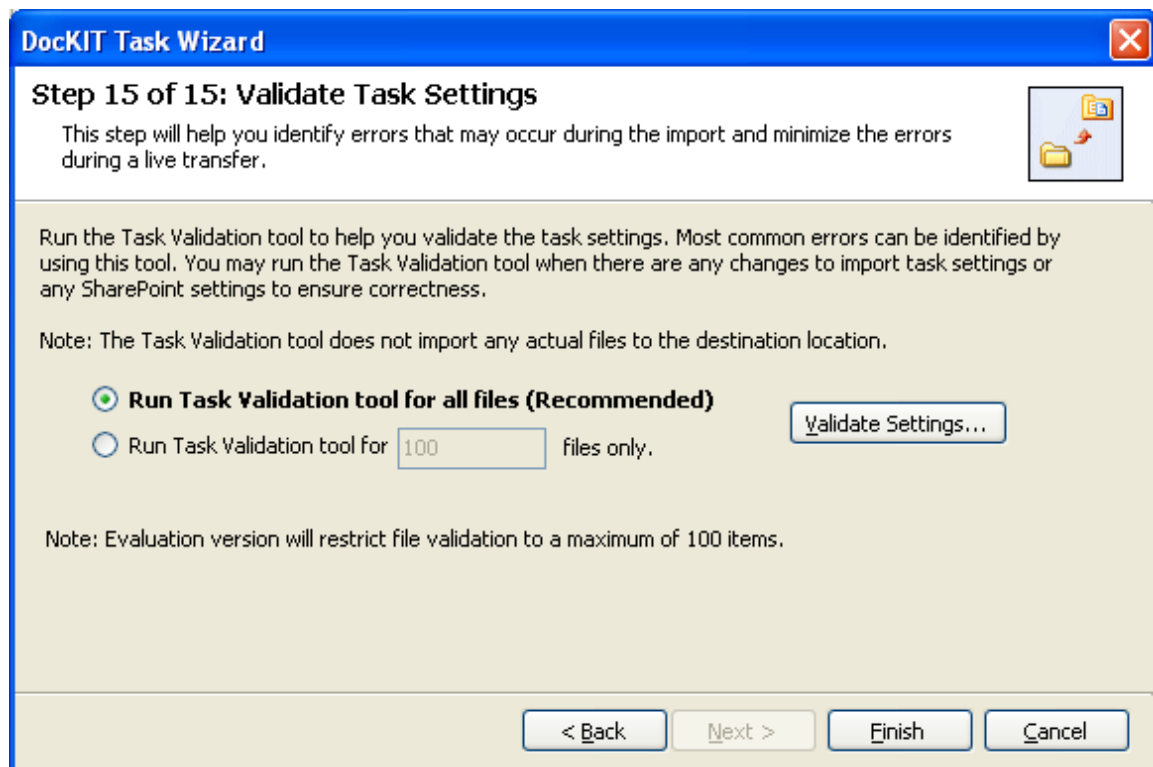
< Back Next > Finish Cancel

Click **Finish** button to create the task.

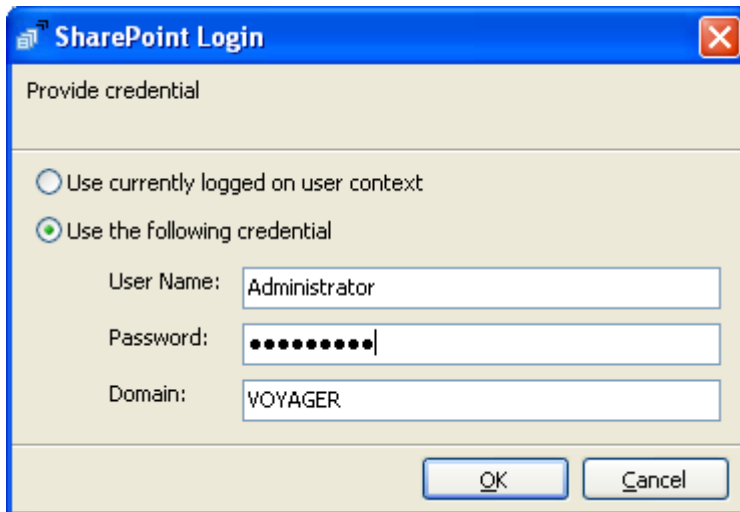
### 7.1.13. Validate Task Settings

Task Validation tool helps you validate the exact steps performed by DockKIT during the import process. This tool does not import any files to the destination location. Most common errors can be identified by using this tool. You may run the Task Validation tool when there are any changes to import task settings or any SharePoint settings to ensure correctness.

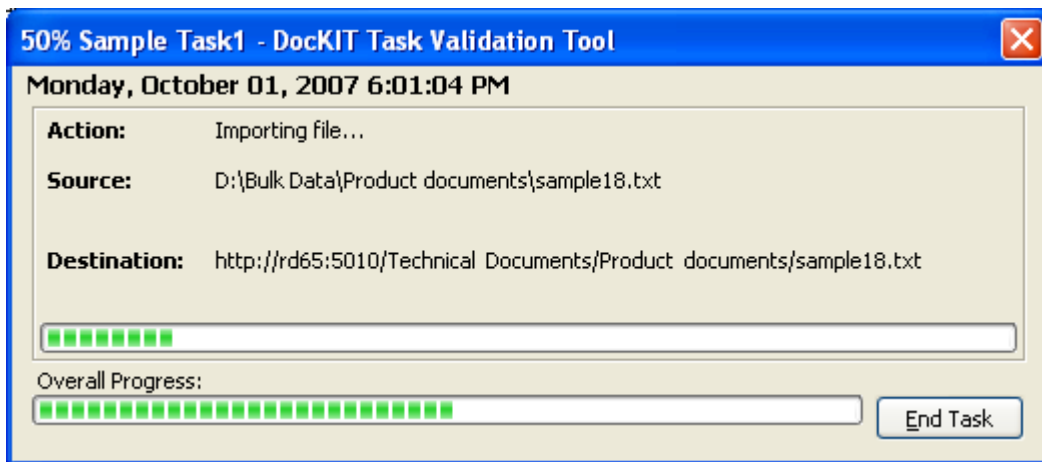
1. The Validate Task Settings step in the DockKIT Task Wizard appears as shown below:



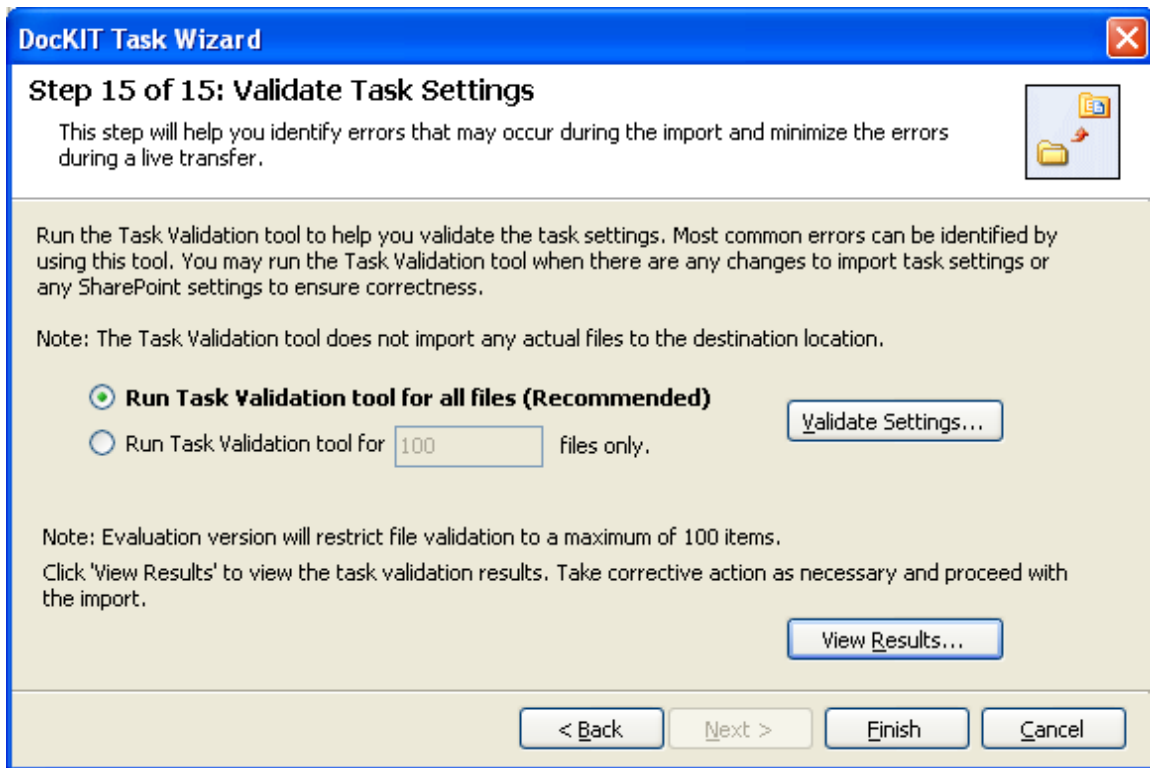
2. Select any of the following options below to specify the number of files to invoke and run the Task Validation tool:
  - a) Run Task Validation tool for all files (Recommended) - This option runs the Task Validation tool for all folders and files specified in the import task wizard.
  - b) Run Task Validation tool for <n> files only - This option runs the Task Validation tool for the specified number of files in the text box.
3. Click Validate Settings button to invoke the Task Validation tool.
4. The SharePoint Login Dialog to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.



You will notice a task progress bar in a new window as shown below.



6. Once the task validation is complete, View Results button will be enabled (as shown below). Click View Results button to view the task validation test results.



7. The Task Validation Results dialog will appear as shown below.

**Task Validation Results**

View task statistics, task results, detailed file results and file errors.

Task Name: Sample Task1

Start Time: 10/1/2007 6:01:04 PM End Time: 10/1/2007 6:01:15 PM Elapsed Time: 00:00:11

Remarks: Completed successfully

Task Statistics Task Results File Errors File Results Resolution Tips

The table below summarizes the task import summary statistics and detailed statistics for each library.

Property	Value
<b>Summary Statistics:</b>	
Number of libraries processed	1
Number of folders processed	0
Number of files processed	4
Total size processed	1140 KB
Total errors	0
<b>Detailed Statistics:</b>	
1. http://rd63:5050/FileSystem Library	
Number of folders processed	0
Number of files processed	4
Size processed	1140 KB
Errors occurred	0

Save Results... Open Log Folder... Close

The validation test results are summarized under four separate tabs:

- a) **Task Statistics:** Summarizes the task import summary statistics and detailed statistics for each destination library.
  - b) **Task Results:** Summarizes the task level check (specifically, import task settings) results from the task validation tool.
  - c) **File Results:** Summarizes the task validation tool results after verification of each folder / file added for import.
  - d) **File Errors:** Summarizes the items for which an error has occurred.
9. Click Save Results button to save the task validation results in Microsoft Excel format. Each tab in Task Validation Results is stored as a separate worksheet in MS-Excel.
  10. Click Open Log Folder button to open the folder that contains the activity log of the task validation results.



**Note:** The task validation check and the actual import results may vary in certain circumstances. The Task Validation Tool does not perform a few checks as they may either slowdown the validation process or may be related to error messages that may result only when performing an actual live transfer. Please note the following additional information about the Task Validation tool:

- a) Blocked file extensions are not checked in the task validation as this SharePoint error message is reported only at the time of a live import to SharePoint.
- b) It is sufficient for the given user credential to have read permissions in the destination library for the task validation tool to execute. The task validation tool does not check for other permissions that may be required for the import task to run successfully.
- c) File level security permissions are not checked in the task validation.
- d) The task validation tool does not verify if the give user credentials can perform check-in / cancel check-out operations on an existing document.
- e) The final document status requested in the task settings is not verified in the task validation process.
- f) Document import may fail due to automatic propagation of file properties during a live transfer to SharePoint and the task validation does not have the ability to trap such related errors.
- g) When a particular folder location does not exist in the destination location and is being created as a new folder using the batch descriptor line item entry, the task validation tool may report any subfolder under the new folder to be a non-existent folder location. You can safely ignore this error message.



## 7.2. How to Create Metadata File

---

The following section gives you the guidelines to create an external metadata file for Import folders / files and metadata task type.

1. The first row of the metadata file should contain the Field Names as headers. In an import task, data type of the columns must be the same across all libraries. SharePoint Columns that are read-only will not be updated by DockIT.
2. The first field should be named as 'Path'. 'Path' field should be followed by other field names separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'List Separator' defined in locale settings in 'Regional and Language Options' in Control Panel and 'Format' string value available in the registry key (HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (comma)	CSVDelimited
; (semi-colon)	Delimited(,)
* (asterisk)	Delimited(*)

3. The Path field will not be carried forward as a metadata field into SharePoint.
4. The first column of all the rows should contain the path of the file e.g., "C:\My Documents\Sample Brochure.doc" (or) "\\ProdServer\My Documents\Sample Sales Template.xls".
5. Be consistent with the drive letters and UNC path when adding folders and file into SharePoint library using DockIT user interface and the path field values in the metadata file. If you use local / mapped drives to import files, ensure the 'Path' field has the corresponding local / mapped drive path (e.g., M:\MyDocs\File1.xls). If you use shares to import file, ensure the 'Path' field has the corresponding UNC path (e.g., \\Machine\_Name\Share\_Name\Sample File1.xls).
6. For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "John Doe". When using accented characters such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be in UNICODE encoded format
7. For Microsoft Excel file formats (XLS / XLSX), do not enclose the field names and their corresponding metadata values within double quotes.
8. Ensure date values are in 'Date Only' or 'Date And Time' format.
9. Lookup data type value will be assigned based on column value only. Lookup columns referring to non-existing list and column will not be updated by DockIT.

10. People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to non-existing user or group will not be updated by DockIT. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account.

The following section describes the data types supported by SharePoint and an example of how to state the value in the metadata file for import.


SharePoint Data Type	Remarks	Example
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\n This is sample for multi-line text"
Date and Time	Date or Date & Time can be given in this field. DockIT provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol (\$) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.	"Male" "15"
Choice (Multiple values)	Text or Number values can be given to this field. The values	"Windows 2000;Windows XP;Windows 2003;Windows

	can be of single or multiple. Multiple values should be separated with ';'.  	Vista"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.  In this case, you must specify the column value in the metadata file. DockKIT will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists.  Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows XP"
Lookup (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.  In this case, you must specify the column value in the metadata file. DockKIT will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists.  Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details;Accounts;Product Details"
People or Group (Single Value)	User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail	"VOYAGER\Administrator" "BUILTIN\Administrator" "Backup Owners" "someone@example.com" "John Doe"

	<p>address (someone@example.com) can be used to denote a user account. The user value format (login name or display name or e-mail address) used to identify the user account must be specified in the import wizard for the values to be interpreted correctly. All the user entries in the external metadata file must be in the same format.</p> <p>Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values.</p> <p>DockKIT will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.</p>	
People or Group (Multiple value)	<p>User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The user value format (login name or display name or e-mail address) used to identify the user account must be specified in the import wizard for the values to be interpreted correctly. All the user entries in the external metadata file must be in the same format.</p> <p>The values can be of single or multiple. Multiple values should be separated with ';'.</p> <p>DockKIT will search for the value in the site users list and assign</p>	"VOYAGER\User1; BUILTIN\Administrators; Guest Members; Temps"

	the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.	
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	"http://rd65:5010/Shared Documents/My Sample File.doc" "http://rd60/Pictures/chart.bmp"

Sample format of a CSV / TEXT metadata file:

 **Note:** Refer Point #2 for the separator to be used in the metadata file

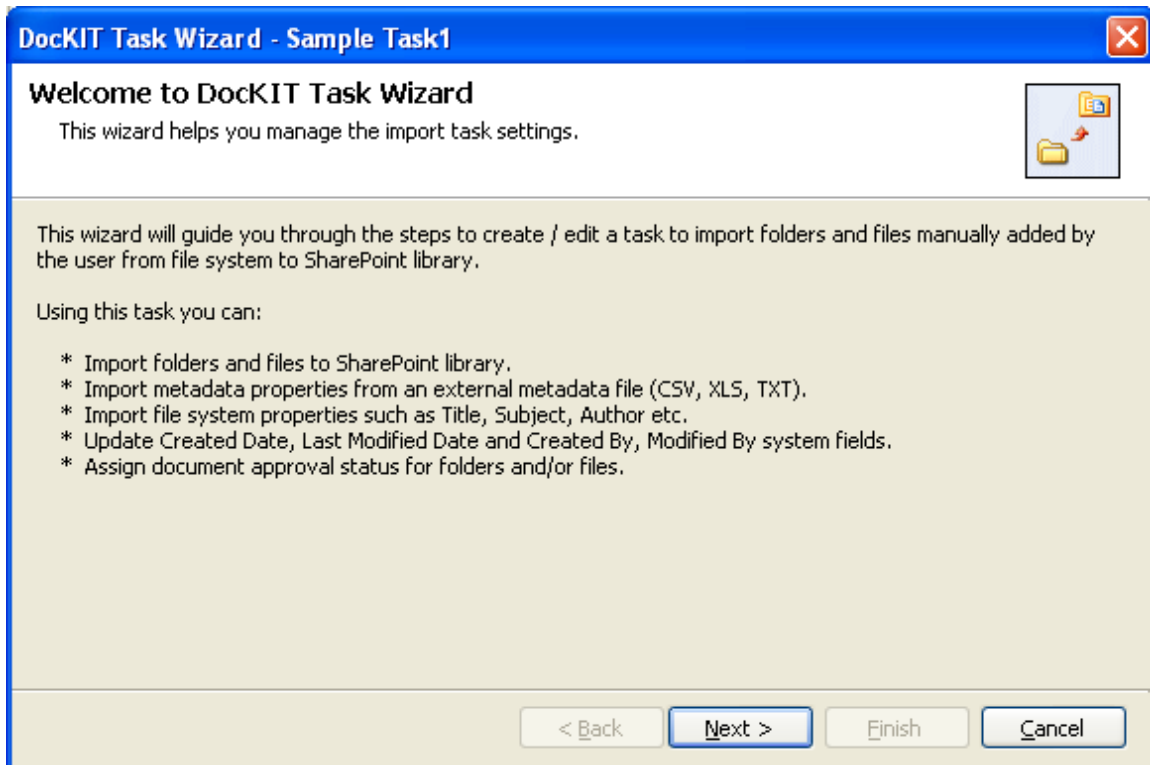
"Path", "Modified Date", "Author Name", "Position", "Department"  
 "C:\My Documents\Sample Brochure.doc", "11/06/2006", "John Doe", "Director", "Senior Management"  
 "C:\My Sales\Sample Sales Template.xls", "11/24/2006", "Jane Doe", "VP Sales", "Corporate Sales"  
 "C:\My Sales\Sample Product Demo.ppt", "09/09/1999", "David Blake", "Sales Manager", "Consumer Sales"

### 7.3. How to edit an existing task

---

Edit task is similar to creating a task, except that a few settings cannot be altered as stated below.

1. The DockIT Task Wizard appears as shown below:



2. Click **Next** button
3. In SharePoint destination location, DockIT Task Wizard allows you to edit the user credentials settings to connect to SharePoint. SharePoint **URL** cannot be altered.

**DockIT Task Wizard - Sample Task1**

**Step 1 of 15: SharePoint destination location**  
Specify a SharePoint URL of a site / library / folder location into which you wish to import folders and files from file system.

URL:

☐ Use currently logged on user context for validation  
☒ Use the following credential for validation

User Name:   
Password:

< Back   Next >   Finish   Cancel

4. Add folders and files as [Items to import](#)
5. Specify [Metadata Options](#)
6. Specify [File System Properties](#)
7. Specify [System Dates](#)
8. Specify [System Users](#)
9. Specify [Content Type Settings](#)
10. Specify [Content Approval Status](#)
11. Specify [Rename folders and files](#)
12. Specify [Folder Options](#)
13. Specify [File Settings](#)
14. Specify [Import Conditions](#)
15. Specify [Document Status](#)
16. In [Task Settings](#) edit mode, DockIT Task Wizard the task name cannot be altered.

**DockIT Task Wizard - Sample Task1**

**Step 14 of 15: Task Settings**

Enter a unique name for the import task and specify schedule task settings.

Task Name:

Task Option: ☐ Run task upon clicking Finish button ☐ Run later ☒ Create Schedule Task

Run As:

Schedule:

Schedule Task Daily

Every  day(s)

At 5:57 PM every day, starting 3/30/2007

< Back   Next >   Finish   Cancel

17. Specify [Validate Task Settings](#)
18. Click Finish button to save the task settings, or click Back button to go to the previous step.

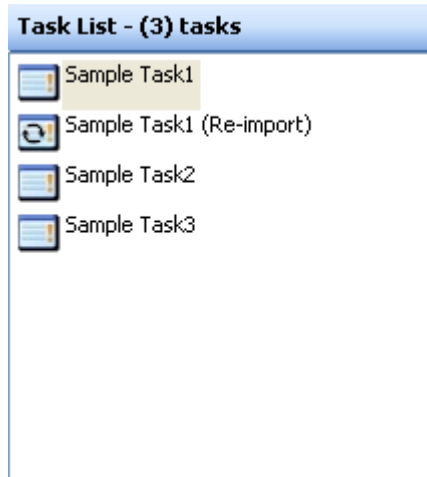


## 7.4. How to copy a task

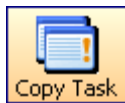
---

To copy or create a new task from an existing DockIT import task:

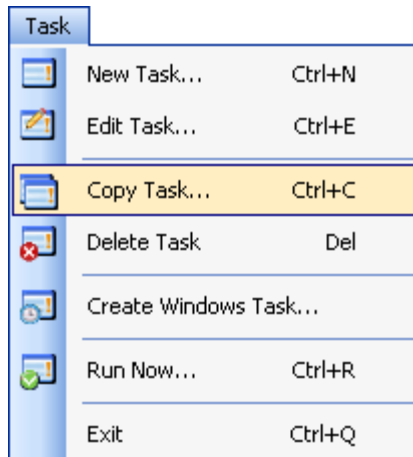
1. Select a task from the Task List pane



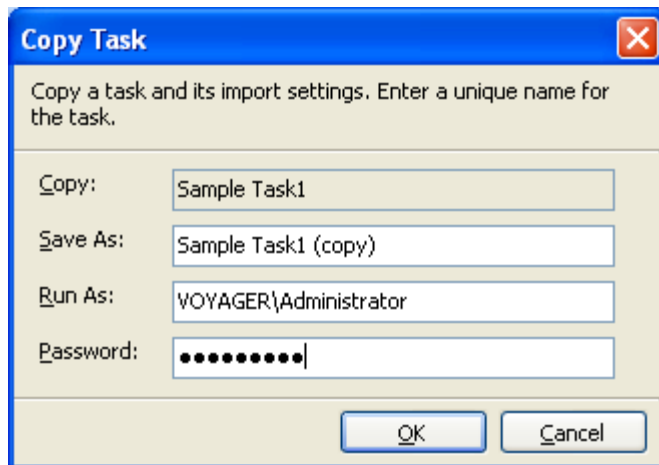
2. Click Copy Task from DockIT main screen.



Or Select Copy Task from Task menu



3. In **Copy Task** dialog, enter a new task name in **Save As** text-box; specify a **Run As** account and **Password** (if applicable) and Click **OK** to create a new task with the same import settings specified in the selected task.



The image shows a Windows-style dialog box titled "Copy Task". It has a blue title bar with a close button (X) in the top right corner. The main area is light beige and contains the following text and fields:

Copy a task and its import settings. Enter a unique name for the task.

Copy: Sample Task1

Save As: Sample Task1 (copy)

Run As: \VOYAGER\Administrator

Password: ●●●●●●●●

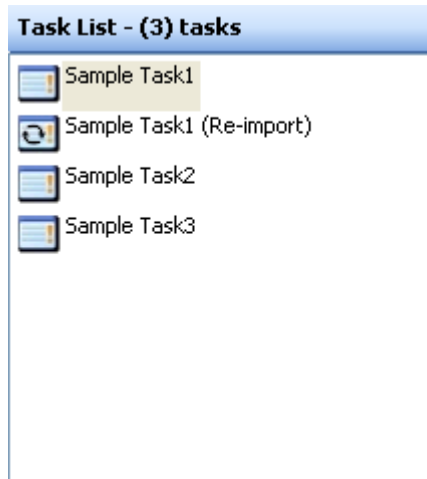
At the bottom right, there are two buttons: "OK" and "Cancel".

## 7.5. How to delete a task

---

To delete a DockIT import task:

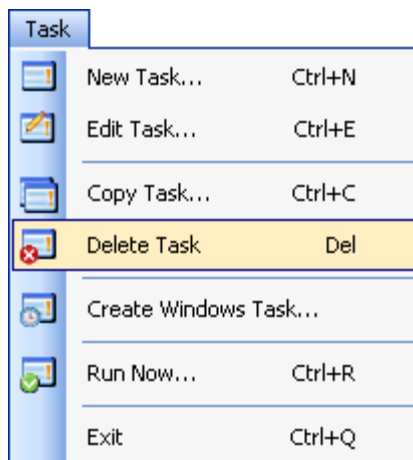
1. Select a task from **Task List** pane.



2. Click **Delete Task** from DockIT main screen

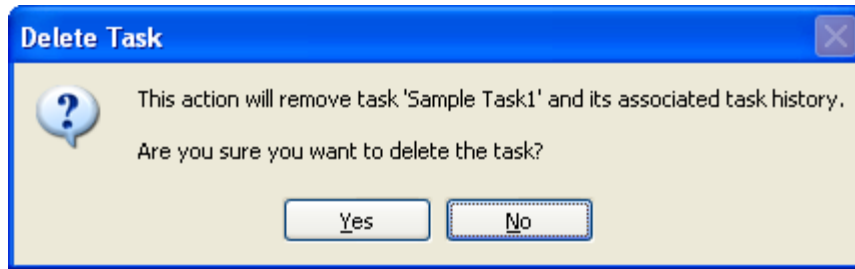



Or Select **Delete Task** from **Task** menu



Or Press **Del** key

3. Click **Yes** in **Delete Task** message-box shown below:



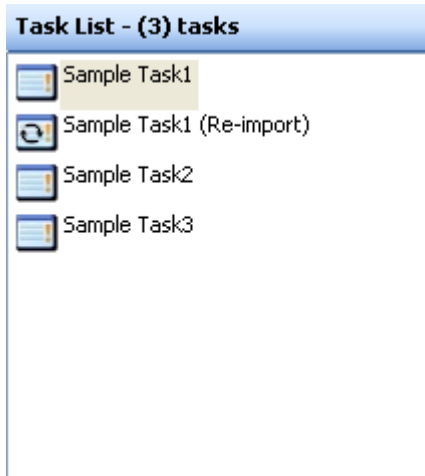
 **Note:** Deleting a task will permanently delete the selected task and its task history items.

## 7.6. How to run a task

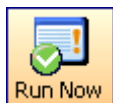
---

DockKIT 'Run Now' feature allows the user to instantiate a task anytime after the task has been created. To run a DockKIT import task:

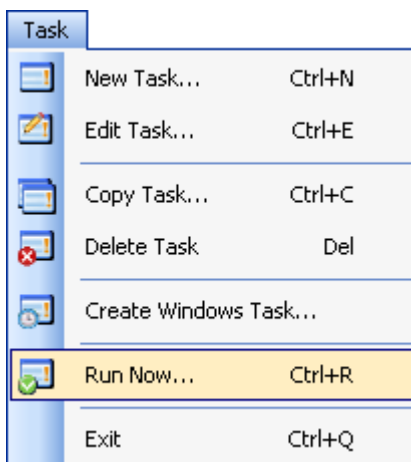
1. Select a task from **Task List** pane.



2. Click **Run Now** from DockKIT main screen.

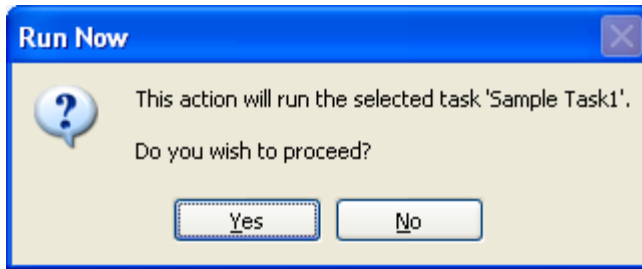


Or Select **Run Now** from **Task** menu

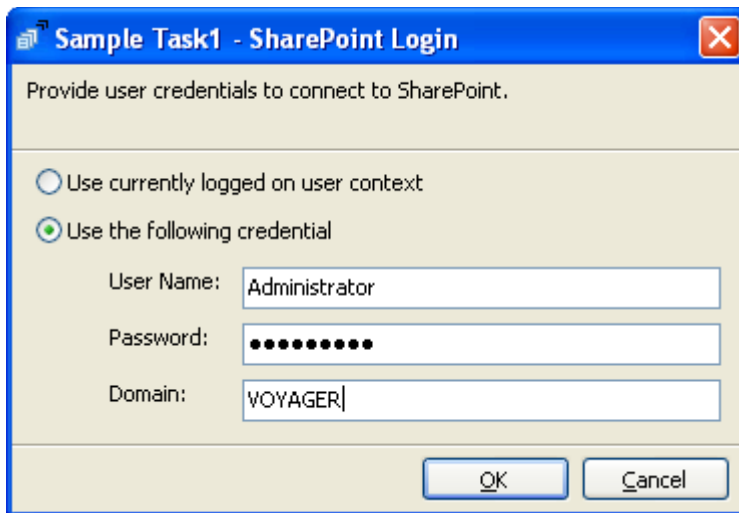


Or Press **Ctrl + R** key

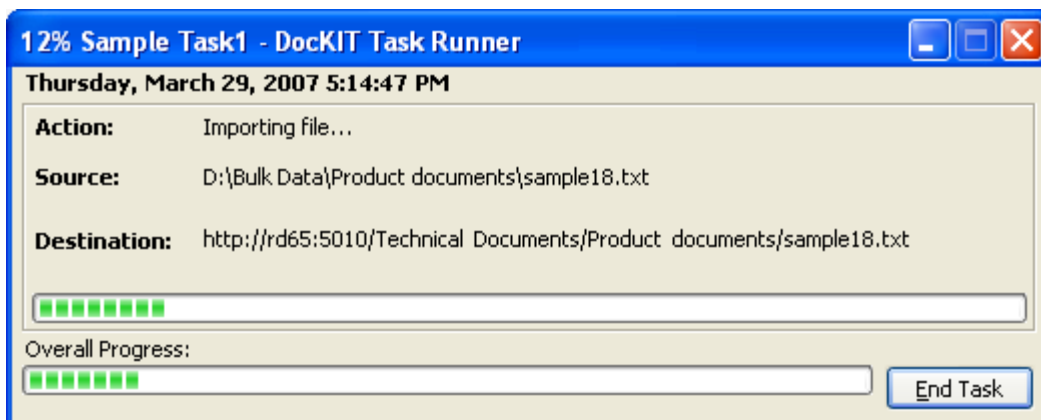
3. Click **Yes** in **Run Now** confirmation message box shown below:



4. The **Credential Dialog** will appear as shown below. The given credential will be used to connect to the SharePoint site.



5. The current process of task will be reported in a new dialog as shown below:



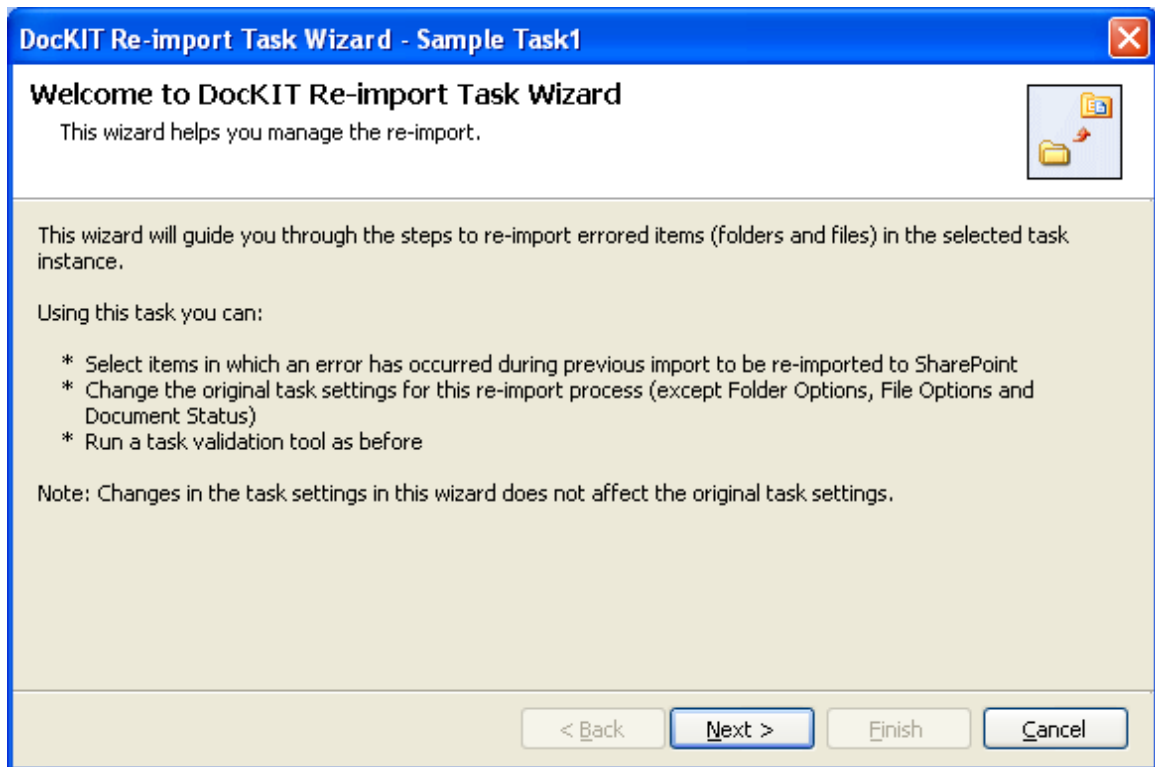
6. Once the import task is complete, a new entry will be added in **Task History** section, where you can view the import activity performed when the task ran last

## 7.7. How to Re-Import a task

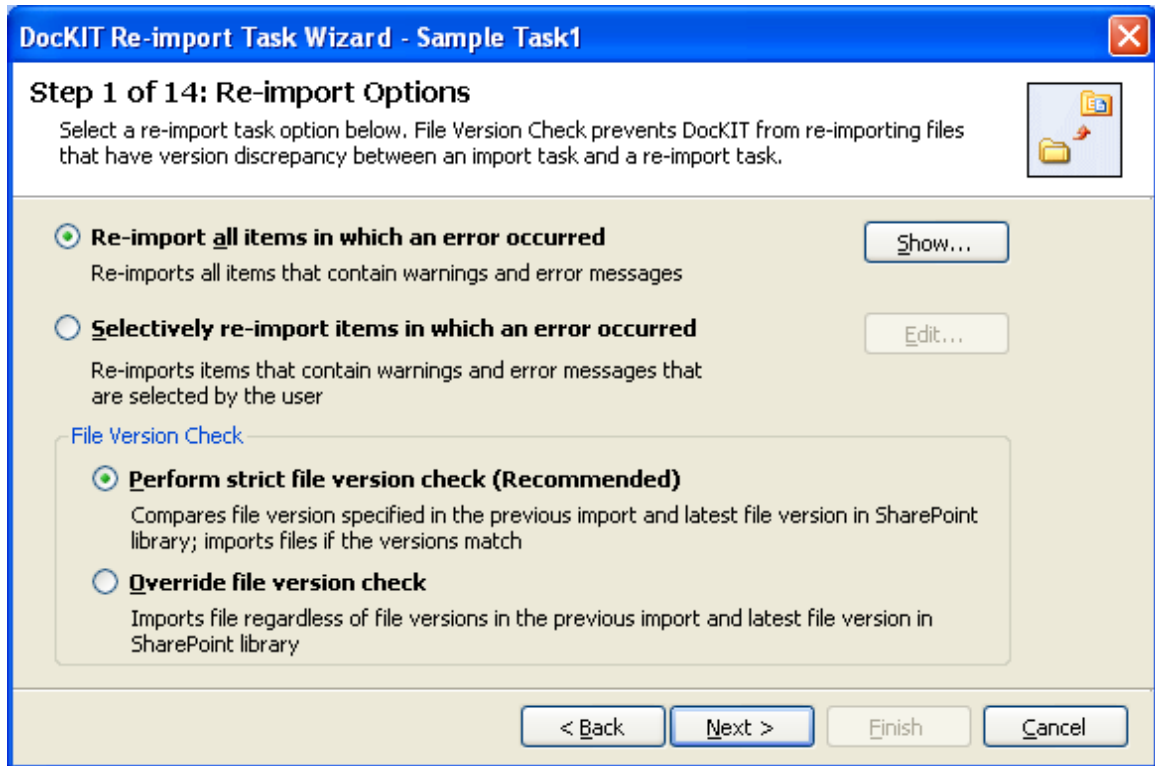
---

The Re-import Task tool will help you re-import folders / files that had errors in them. Re-import Task is similar to a new task, except that you can import only folders / files that resulted in errors. You can change the original task settings in a re-import task, except Folder Options, File Options and Document Status settings that were defined in the original task.

1. The **DockIT Re-import Task Wizard** appears as shown below. Click **Next** button to proceed.

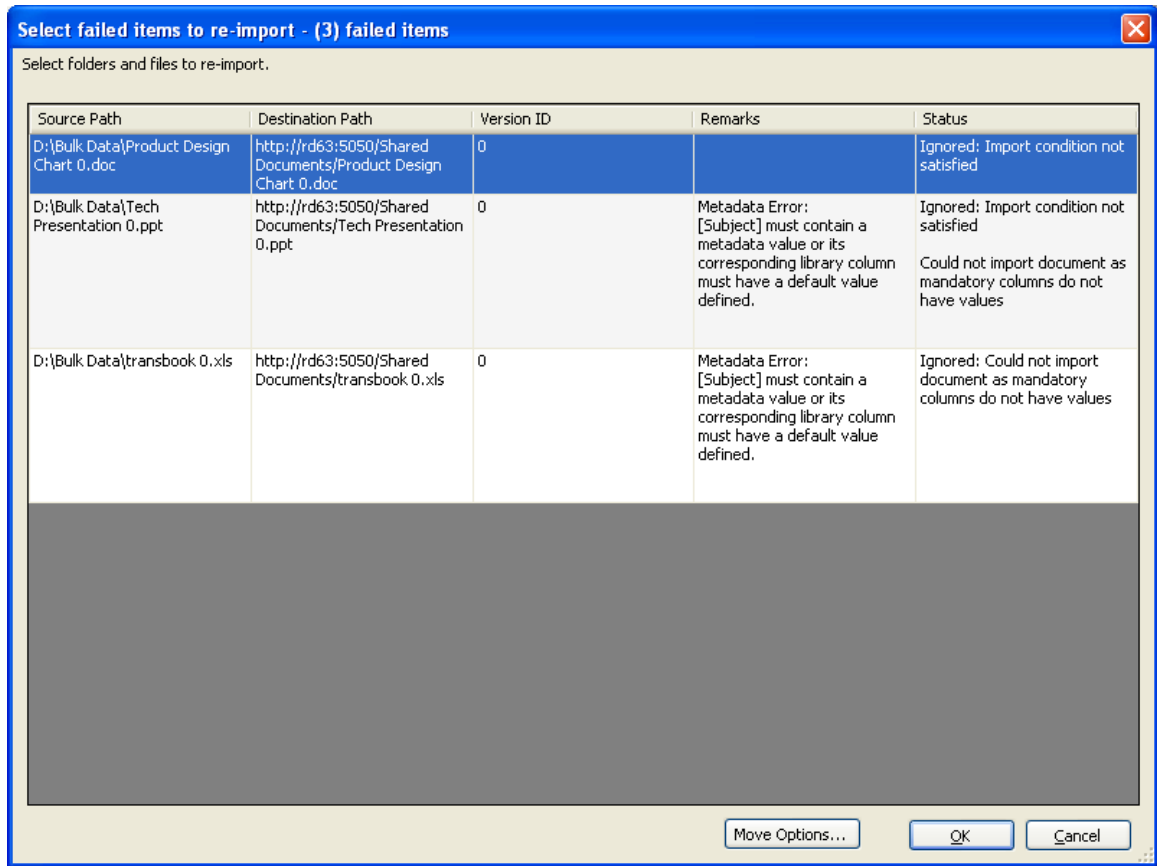


2. Re-import Options step appears as shown below:

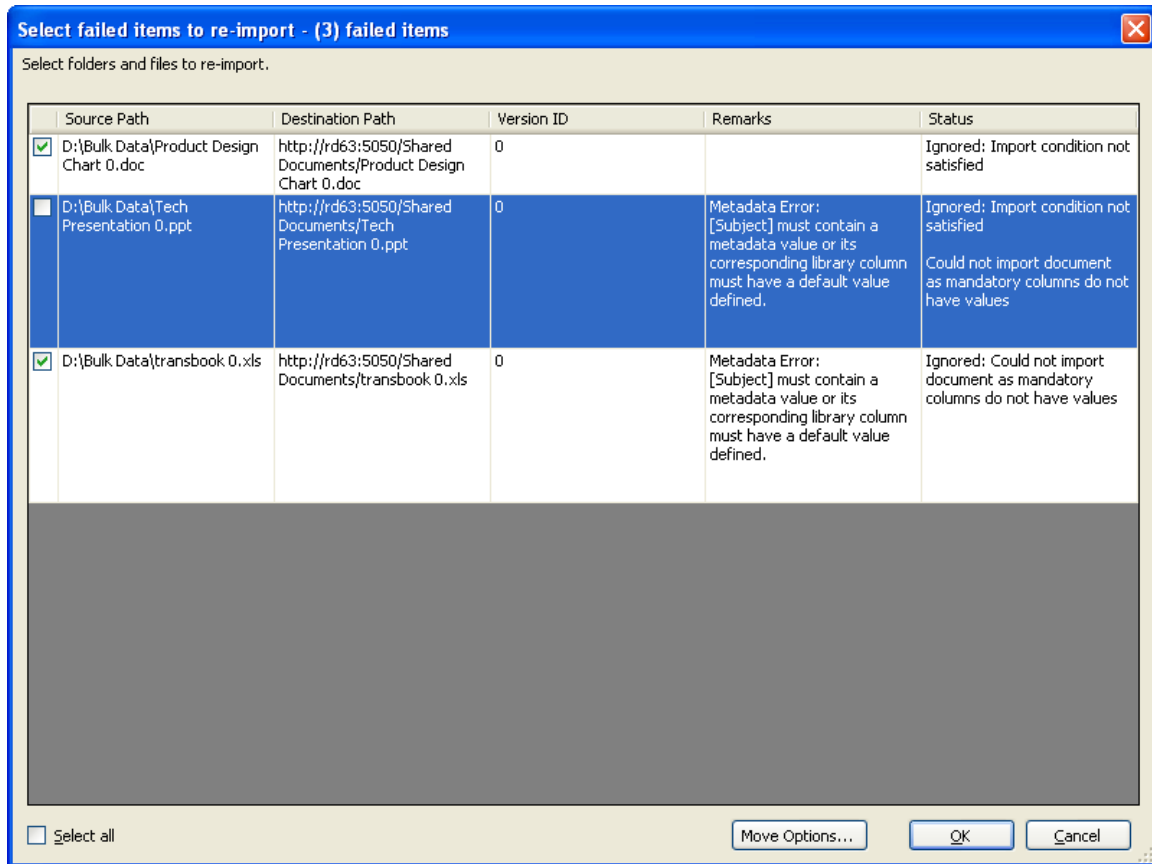


- a. **Re-import all items in which an error occurred** - Re-imports all folder / file items that contain warnings and error messages. Click **Show...** button to view items to be re-imported. The **Re-import File List** dialog appears as shown below.





- b. **Selectively re-import items in which an error occurred** - Re-imports items that contain warnings and error messages that are selected by the user. Click **Edit...** button to select the required items to be re-imported by this task. The **Re-import File Selection** dialog appears as shown below.



3. In order to move the source folders and files to the specified location after completing re-import process, click Move Options... for more information
4. File Version Check prevents DockIT from re-importing files that have newer version of files in a SharePoint library, in the elapsed time between an import task and a re-import task. Select a File Version Check setting from any one of the following options given below:
  - a. **Perform strict file version check (Recommended)** - Compares file version specified in the previous import and latest file version in SharePoint library; imports files if the versions match and ignores files whose file version's do not match at the time of re-import. For example, let's assume that DockIT attempted to import file (say, "Test Document.doc") as version (say, 1.6) in the import task and it failed for some reason. The file version check will ensure that the re-import task is importing ("Test Document.doc") as version 1.6 again, in order to avoid importing files when a newer version of the file may have been added by another user. This check is performed by comparing the last version that DockIT tried to import and the current file version in the SharePoint library, at the time of re-import.
  - b. **Override files version check** - Imports file regardless of file version in the previous import and latest file version in SharePoint library. The file version is completely ignored.

5. Follow the same steps in Create Task wizard for the remaining steps. Please note that the original task settings in Folder Options, File Settings and Document Status cannot be altered.

Also see: [Shrinking a SharePoint Content Database](#)

## ***8) Import documents from a batch descriptor file***

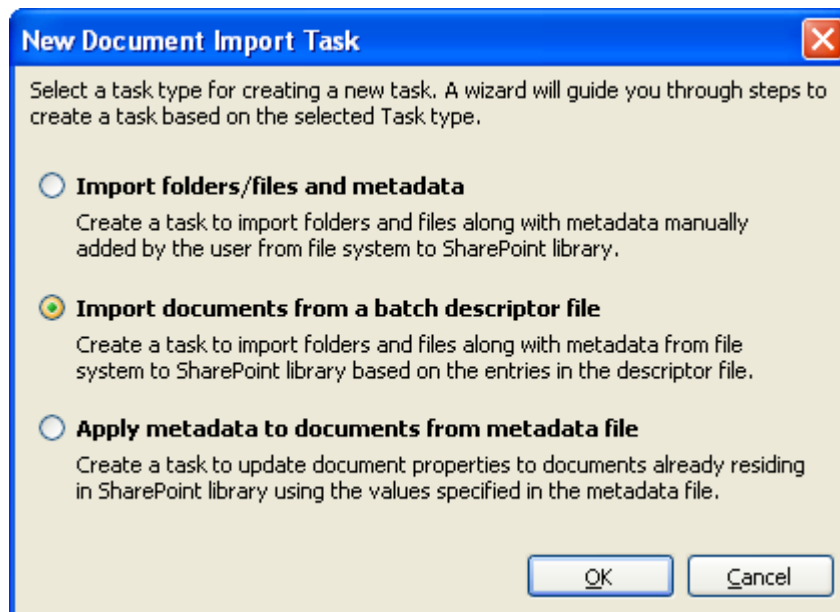
---

### **8.1. Create Task**

---

Create a task to import folders and files along with metadata from file system to SharePoint Library based on the entries in the descriptor file. DockIT will process the files in the order in which they appear in the batch descriptor file.

1. Select **Import documents from a batch descriptor file** option in **New Document Import Task** dialog as shown below and click **OK**.



2. The **DocKIT Task Wizard** appears



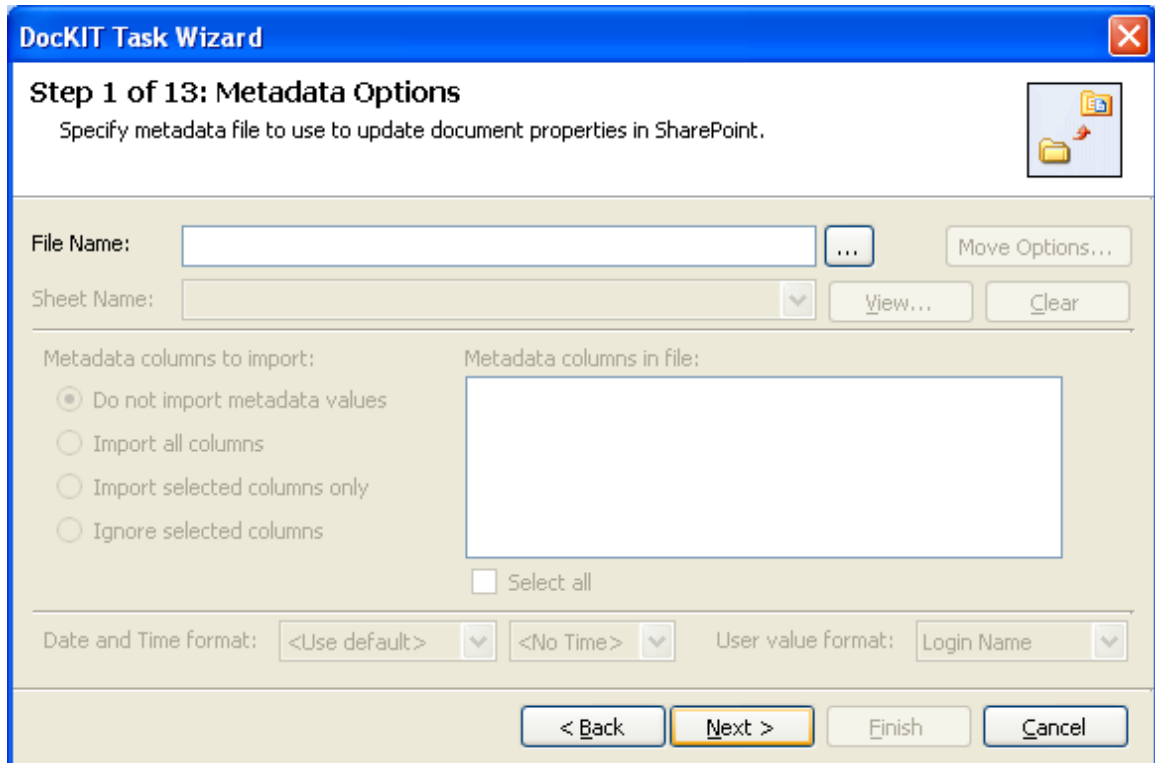
3. Click **Next** button
4. Specify [Metadata Options](#)
5. Specify [File System Properties](#)
6. Specify [System Dates](#)
7. Specify [System Users](#)
8. Specify [Content Type Settings](#)
9. Specify [Content Approval Status](#)
10. Specify [Rename folders and files](#)
11. Specify [Folder Options](#)
12. Specify [File Settings](#)
13. Specify [Import Conditions](#)
14. Specify [Document Status](#)
15. Specify [Task Settings](#)
16. Specify [Validate Task Settings](#)
17. Click **Finish** button to create the task, or click **Back** button to change the any task settings.

### 8.1.1. Metadata Options

---

To specify the external metadata file to use to document properties in SharePoint:

1. The **Metadata Options** step appears as shown below



2. **Click (...)** button to specify the external metadata file. The metadata file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLS) or Text file (TXT).
3. The external metadata file will automatically be extracted once the file name is specified. If you are using a Microsoft Excel based metadata file, then select the sheet name to use from the drop-down.
4. In order to move the source folders and files to the specified location after completing import process, click [Move Options...](#) for more information
5. Specify the **Metadata columns to import** by choosing one of the options given below:
  - a. **Do not import metadata values** - No columns will be imported
  - b. **Import all columns** - All columns available in the metadata file will be imported
  - c. **Import selected columns only** - Selected columns only will be imported
  - d. **Ignore selected columns** - All columns will be imported, except the selected columns
6. **Select** the required columns from the metadata file to be updated in SharePoint based on the selected option in step 4.

7. Specify the **Date and Time format** for the date fields in the metadata file. If the columns selected to import contain date and time values, specify the date mask to parse the date values. The default value is the current system settings.

**DocKIT Task Wizard**

**Step 1 of 13: Metadata Options**

Specify metadata file to use to update document properties in SharePoint.

File Name: D:\Bulk Data\Batch document metadata.csv ... Move Options...

Sheet Name: View... Clear

Metadata columns to import:

- ☐ Do not import metadata values
- ☐ Import all columns
- ☒ Import selected columns only
- ☐ Ignore selected columns

Metadata columns in file:

- ☐ path
- ☐ destination path
- ☒ title
- ☒ subject
- ☒ document type
- ☒ Issue Date
- ☐ Select all

Date and Time format: <Use default> <No Time> User value format: Login Name

< Back Next > Finish Cancel

Click **Next** to proceed.

### 8.1.2. File Systems Properties

---

DockKIT imports the file properties of documents available in the 'Summary' tab of file properties as seen in Windows Explorer / MS Office. SharePoint automatically propagates custom properties of MS-Office documents, namely, MS-Word, MS-Excel and MS-PowerPoint.

DockKIT updates the File System Properties in the respective SharePoint site columns. DockKIT automatically maps the file system properties with their respective SharePoint site columns internal names in their respective SharePoint language. Hence, the system site columns have to be included in the SharePoint library for the file system properties to be updated correctly.

To include the Site Columns to a SharePoint library: [Site Name] --> [Library Name] --> Settings --> Add Columns from Site Columns

The table below summarizes the default Site Columns that are updated by DockKIT:

SharePoint Group Name	SharePoint Column Name
Core Document Columns	Subject
	Author
	Category
	Comments
	Keywords
Core Contact and Calendar Columns	Company
	Manager's Name

When importing Microsoft Office 2007 documents (Open XML documents) with their File System Properties, please ensure the machine running DockKIT has either Microsoft Office 2007 Suite or [Microsoft Office 2007 Compatibility Pack](#) is installed. In other words, you do not require these applications if you are not importing the file system properties of MS Office 2007 documents. DockKIT will not be able to update the respective site columns (will be left blank) in case this system requirement is not met.

To specify file system properties to import for documents, perform the steps given below:

1. The **File System Properties** step appears as shown below:



2. Select any one of the following **File Properties** options given below:
  - a) **Do not import file system properties** - File properties will not be imported by DocKIT. Please note that SharePoint will automatically propagate file system properties of MS-Office documents.
  - b) **Import selected file system properties** - Selected file system properties will be imported to SharePoint. Select the file system properties to import from the list box.

3.

4. In case there are any duplicates in column names available in the external metadata file and the file system properties (e.g., 'Author' column is available in the external metadata file and has been selected in the File System Properties screen), you have the option to specify, which value is to be used to update the SharePoint column:
- Use file system properties** - File properties' value will be taken for updating the respective SharePoint columns.
  - Use columns from metadata file** - External metadata field's value will be taken for updating the respective SharePoint columns.

Click **Next** to proceed.

Also see: [Shrinking a SharePoint Content Database](#)

**8.1.3.      [System Dates](#)**

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**8.1.4.      [System Users](#)**

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**8.1.5.      [Content Type Settings](#)**

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**8.1.6.      [Content Approval Status](#)**

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**8.1.7.      [Rename folders and files](#)**

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**8.1.8.      [Folder Options](#)**

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**8.1.9.      [File Settings](#)**

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**8.1.10.     [Import Conditions](#)**

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**8.1.11.     [Document Status](#)**

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**8.1.12.     [Task Settings](#)**

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**8.1.13.     [Validate task Settings](#)**

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## 8.2. Create Batch Descriptor File

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The following section gives you the guidelines to create an external batch descriptor file for **Import documents from a batch descriptor file** task type.

1. The first row of the metadata file should contain the Field Names as headers. In an import task, data type of the columns must be the same across all libraries. SharePoint Columns that are read-only will not be updated by DockIT.
2. The first field should be named as 'Path' and second field should be named as 'Destination Path'. Other field names should be followed separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'List Separator' defined in locale settings in 'Regional and Language Options' in Control Panel and 'Format' string value available in the registry key  
(HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (comma)	CSVDelimited
; (semi-colon)	Delimited(;
* (asterisk)	Delimited(*)

3. The Path field will not be carried forward as a metadata field into SharePoint.
4. The first column of all the rows should contain the source path of the file e.g., "C:\My Projects\Sales Brochures.doc" (or) [\\FileServer\My Documents\Sales Templates.xls](#)
5. Be consistent with the drive letters and UNC path when adding folders and file into SharePoint library using DockIT user interface and the path field values in the metadata file. If you use local / mapped drives to import files, ensure the 'Path' field has the corresponding local / mapped drive path (e.g., M:\My Document\Sample File.xls). If you use shares to import file, ensure the 'Path' field has the corresponding UNC path (e.g., \\Machine\_Name\Share\_Name\Sample File.xls).
6. The second column of all the rows should contain the destination path of the file e.g., http:\\RD65\technical documents\folder1. In this case the destination path should be either SharePoint Library URL or sub-folder URL of SharePoint Library.
7. For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "John Doe". When using accented characters such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be in UNICODE encoded format.

8. For Microsoft Excel file formats (XLS / XLSX), do not enclose the field names and their corresponding metadata values within double quotes.
9. Ensure date values are in 'Date Only' or 'Date And Time' format.
10. Lookup data type value will be assigned based on column value only. Lookup columns referring to **non-existing list and column** will not be updated by DockIT.
11. People or Group data type value should be user name, Active Directory (AD) group name or SharePoint group name. User or group name referring to **non-existing user or group** will not be updated by DockIT. The user Login Name (domain\username), Display Name (John Doe) or E-mail address ([someone@example.com](mailto:someone@example.com)) can be used to denote a user account.

The following section describes the data types supported by SharePoint and an example of how to state the value in the batch descriptor file for import.

SharePoint Data Type	Remarks	Example
Yes/No	If any other value appears in the metadata file, other than Yes/No, default value will be assigned.	"Yes" "No"
Text	The text length should not exceed 255 characters.	"This is sample text"
Multi-line Text	The text length should not exceed 255 characters (preferred).	"This is sample text\nThis is sample for multiline text"
Date and Time	Date or Date & Time can be given in this field. DockIT provides an user option to specify the date mask to use for the date fields in metadata file in the task setup wizard.	"12/30/2006 10:50 AM" "1/25/2007"
Number	The fixed or floating number can be given to this field. The value should not exceed the numeric boundary.	"10" "3.41"
Currency	The fixed or floating number can be given to this field. Do not use any currency symbol (\$) with this field value. The value should not exceed the currency boundary.	"100" "10000" "1500.67"
Choice (Single value)	Text or Number value can be given to this field. Do	"Male" "15"

	not use multiple values unless defined in SharePoint to accept multiple values.	
Choice (Multiple values)	Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.  	"Windows 2000;Windows XP; Windows 2003;Windows Vista"
Lookup (Single value)	Text or Number value can be given to this field. Do not use multiple values unless defined in SharePoint to accept multiple values.  In this case, you must specify the column value in the metadata file. DocKIT will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists.  Note: If the specified column value is of folder type, the ID of the folder will not be assigned.	"Windows XP"
Lookup (Multiple values) Text or Number values can be given to this field. The values can be of single or multiple. Multiple values should be separated with ';'.  	In this case, you must specify the column value in the metadata file. DocKIT will search for the value in the corresponding column of the referenced list and assign the ID of the first item matching the column value to the lookup column of the imported file, only if the column value exists.  Note: if the specified column value is of folder type, the ID of the folder will not be assigned.	"Stock Details; Accounts; Product Details"

People or Group (Single Value)	<p>User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The user value format (login name or display name or e-mail address) used to identify the user account must be specified in the import wizard for the values to be interpreted correctly. All the user entries in the external metadata file must be in the same format.</p> <p>Do not use multiple values unless the equivalent column defined in SharePoint can accept multiple values.</p> <p>DockIT will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.</p>	"VOYAGER\Administrator" "BUILTIN\Administrators" "Backup Owners" "someone@example.com" "John Doe"
People or Group (Multiple value)	<p>User name, AD Group name or SharePoint Group name can be given to this field. The user Login Name (domain\username), Display Name (John Doe) or E-mail address (someone@example.com) can be used to denote a user account. The user value format (login name or display name or e-mail</p>	"VOYAGER\User1; BUILTIN\Administrators; Guest Members; Temps"

	<p>address) used to identify the user account must be specified in the import wizard for the values to be interpreted correctly. All the user entries in the external metadata file must be in the same format.</p> <p>The values can be of single or multiple. Multiple values should be separated with ';'.          DocKIT will search for the value in the site users list and assign the ID of the matching the user or group name to the People or Group column of the imported file, only if the user or group name exists.</p>	
Hyperlink or Picture	The http URL of any resource or picture can be given to this field.	<p>"http://rd65:5010/Shared Documents/My sample file.doc"</p> <p>"http://rd60/Pictures/chart.bmp"</p>

**Sample format of a CSV / TEXT batch descriptor file:**

 **Note:** Refer Point #2 for the separator to be used in the batch descriptor file

```
"Path","Destination Path","Issue Date","Author Name","Position","Department"
"C:\My Documents\Sample Brochure.doc","http://rd60/libone1","11/06/2006","John
Doe","Director","Senior Management"
"C:\My Sales\Sample Sales Template.xls","http://rd60/libone2","11/24/2006","Jane Doe","VP
Sales","Corporate Sales"
"C:\My Sales\Sample Product Demo.ppt","http://rd60/libone3/folder","09/09/1999","David
Blake","Sales Manager","Consumer Sales"
```



**8.2.1. [Edit task](#)**

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**8.2.2. [Copy task](#)**

---

**8.2.3. [Delete task](#)**

---

**8.2.4. [Run task](#)**

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**8.2.5. [Re-import task](#)**

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## ***9) How to apply metadata to documents from metadata file***

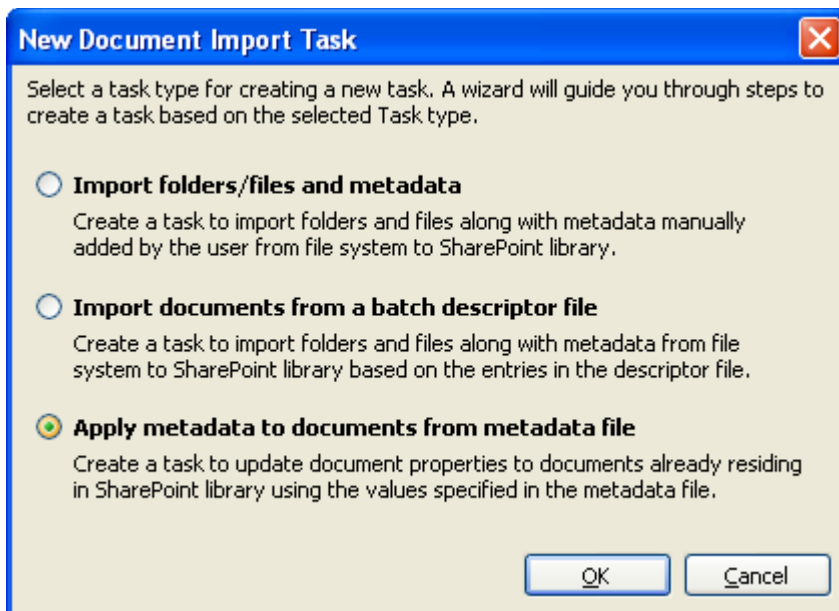
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### **9.1. How to create a new task**

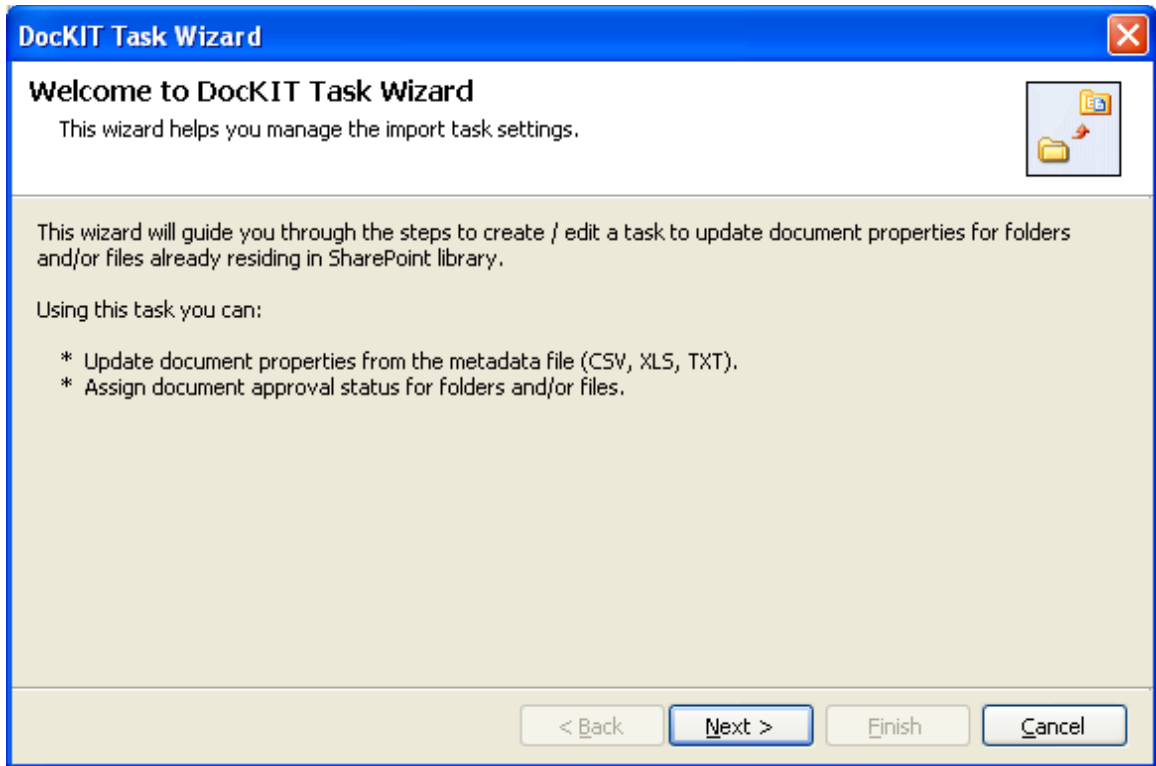
---

To create a task to update document properties to documents already residing in SharePoint library using the values specified in the metadata file:

1. Select **Apply metadata to documents from metadata file** option in **New Document Import Task** dialog as shown below and click OK.



2. The **DocKIT Task Wizard** appears



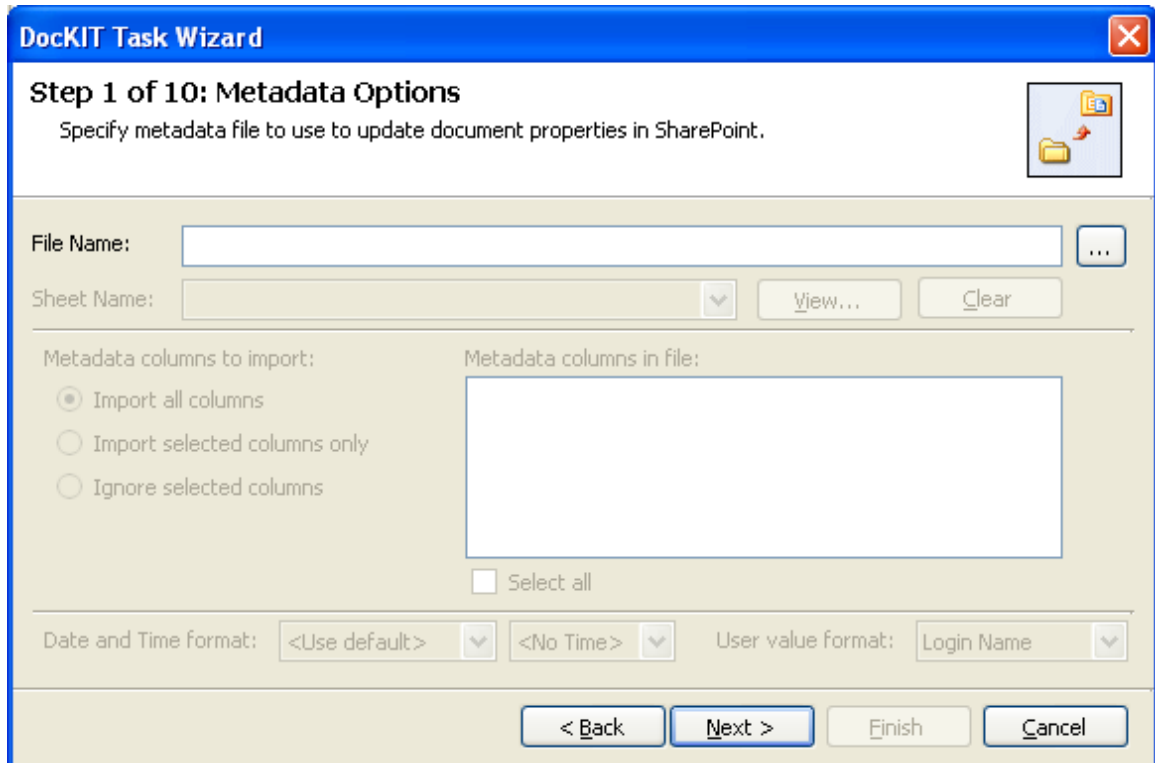
3. Click **Next** button
4. Specify [Metadata Options](#)
5. Specify [System Dates](#)
6. Specify [System Users](#)
7. Specify [Content Type Settings](#)
8. Specify [Content Approval Status](#)
9. Specify [File Settings](#)
10. Specify [Import Conditions](#)
11. Specify [Document Status](#)
12. Specify [Task Settings](#)
13. Specify [Validate Task Settings](#)
14. Click **Finish** button to create the task, or click **Back** button to change the any task settings.

### 9.1.1. Metadata Options

---

To specify the external metadata file to use to document properties in SharePoint:

1. The **Metadata Options** step appears as shown below



2. **Click (...)** button to specify the external metadata file. The metadata file can be any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLS) or Text file (TXT).
3. The external metadata file will automatically be extracted once the file name is specified. If you are using a Microsoft Excel based metadata file, then select the sheet name to use from the drop-down.
4. Specify the **Metadata columns to import** by choosing one of the options given below:
  - a. **Import all columns** - All columns available in the metadata file will be imported
  - b. **Import selected columns only** - Selected columns only will be imported
  - c. **Ignore selected columns** - All columns will be imported, except the selected columns
5. Select the required columns from the metadata file to be updated in SharePoint based on the selected option in step 4.
6. Specify the **Date and Time format** for the date fields in the metadata file. If the columns selected to import contain date and time values, specify the date mask to parse the date values. The default value is the current system settings.

7.

**DocKIT Task Wizard**

**Step 1 of 10: Metadata Options**

Specify metadata file to use to update document properties in SharePoint.

File Name: D:\Bulk Data\Latest document metadata.csv

Sheet Name: [Empty]

Metadata columns to import:

- ☐ Import all columns
- ☒ Import selected columns only
- ☐ Ignore selected columns

Metadata columns in file:

- ☒ Content Type
- ☒ Author
- ☒ Editor
- ☒ Life cycle status
- ☒ Life cycle comments

☐ Select all

Date and Time format: <Use default> <No Time>

User value format: Login Name

< Back Next > Finish Cancel

Click **Next** to proceed.

### 9.1.2. System Dates

**Note:** DocKIT Web Services must be installed in Windows Server 2003 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0 (32-bit or 64-bit platform) to activate this feature. Please ensure the user name specified in SharePoint Login dialog / user account specified in the Run As parameter in the scheduled task is a:

- Member of administrators group in the local server and remote SQL Server (or)
- Application pool user account (or)
- Owner of the site where the destination library resides

1. To specify System Dates (Created Date and Last Modified Date) to be assigned to the folder and file.

When DocKIT connects to a DocKIT Web Services enabled SharePoint site, the System Dates step will appear as shown in the screen below:

**DocKIT Task Wizard**

**Step 2 of 10: System Dates**

Propagate Created Date and Last Modified Date to SharePoint from the original source. This feature requires DocKIT Web Services to be installed on the destination SharePoint Server.

**Folder System Dates**

☐ Created Date: Assign from metadata file Column name: path

☐ Modified Date: Assign from metadata file Column name: path

**File System Dates**

☐ Created Date: Assign from metadata file Column name: path

☐ Modified Date: Assign from metadata file Column name: path

Date and Time format: <Use default> <No Time>

< Back Next > Finish Cancel

## 2. Import Folder System Dates

You can assign the system date fields for folders. Select Created Date and Last Modified Date fields checkbox for folders as appropriate and select one of the Folder System Date options given below:

**Assign from metadata file** - The date fields can be assigned from the external metadata file by including the respective date field columns (e.g., CDate, LModDate) in the metadata file. This option allows each folder to have its own system dates. The date mask specified in Step 3: Metadata Options will be used to parse the date value. If the metadata value is unavailable, invalid or in case of any failure while parsing the date value, the current import time will be assigned automatically.

## 3. Import File System Dates

You can assign the system date fields for files. Select Created Date and Last Modified Date fields checkbox for files as appropriate and select one of the File System Date options given below:

**Assign from metadata file** - The date fields can be assigned from the external metadata file by including the respective date field columns (e.g., CDate, LModDate) in the metadata file. This option allows each file to have its own system dates. The date mask specified in Step 3: Metadata Options will be used to parse the date value. If the metadata value is unavailable, invalid or in case of any failure while parsing the date value, the current import time will be assigned automatically.

4.

**DocKIT Task Wizard**

**Step 2 of 10: System Dates**

Propagate Created Date and Last Modified Date to SharePoint from the original source. This feature requires DocKIT Web Services to be installed on the destination SharePoint Server.

**Folder System Dates**

☒ Created Date: Assign from metadata file Column name: Issue Date

☐ Modified Date: Assign from metadata file Column name: path

**File System Dates**

☐ Created Date: Assign from metadata file Column name: path

☒ Modified Date: Assign from metadata file Column name: Issue Date

Date and Time format: <Use default> <No Time>

< Back Next > Finish Cancel

5. For more information, please visit Importing System Dates section in the help file.

Also see: Shrinking a SharePoint Content Database

### 9.1.3. System Users

**Note:** DocKIT Web Services must be installed in Windows Server 2003 running Microsoft Office SharePoint Server 2007 or Windows SharePoint Services v3.0 (32-bit or 64-bit platform) to activate this feature. Please ensure the user name specified in SharePoint Login dialog / user account specified in the Run As parameter in the scheduled task is a:

- Member of administrators group in the local server and remote SQL Server (or)
- Application pool user account (or)
- Owner of the site where the destination library resides

1. To specify System Users (Created By and Modified By) to be assigned to the folder and/or file:

When DocKIT connects to a DocKIT Web Services enabled SharePoint site, the System Users step will appear as shown in the screen below:

## 2. Import Folder System Users

Select Created By and Modified By fields checkbox as appropriate and use one of the Folder System Users options given below, by which DocKIT determines the source of system user values for the respective folder.

The user value can be the Login Name or Display Name or E-Mail address of the user. DocKIT will search the site users list and assign the ID of the matching user to the People or Group column of the respective folder, only if the user name exists. Do not use multiple values.

**Specify user name** - The specified user value will be assigned to the respective user fields. Select the user value format from User Value Format option to search the User ID in the site users list for the specified user value. The default format of the user account is the user login name (DOMAIN\USER).

**Assign from metadata file** - The system users can also be assigned from the external metadata file by including the folder system users column names in the metadata file. This option allows each folder to have its own system users, so long as the stated user already exists in the SharePoint library. The user value format specified in Step 3: Metadata Options will be used to search the User ID in the site users list. If the metadata entry is not available, the current import user will be assigned automatically.

## 3. Import File System Users

Select Created By and Modified By fields checkbox as appropriate and use one of the File System User options given below, by which DocKIT determines the source of system user values for the respective file.

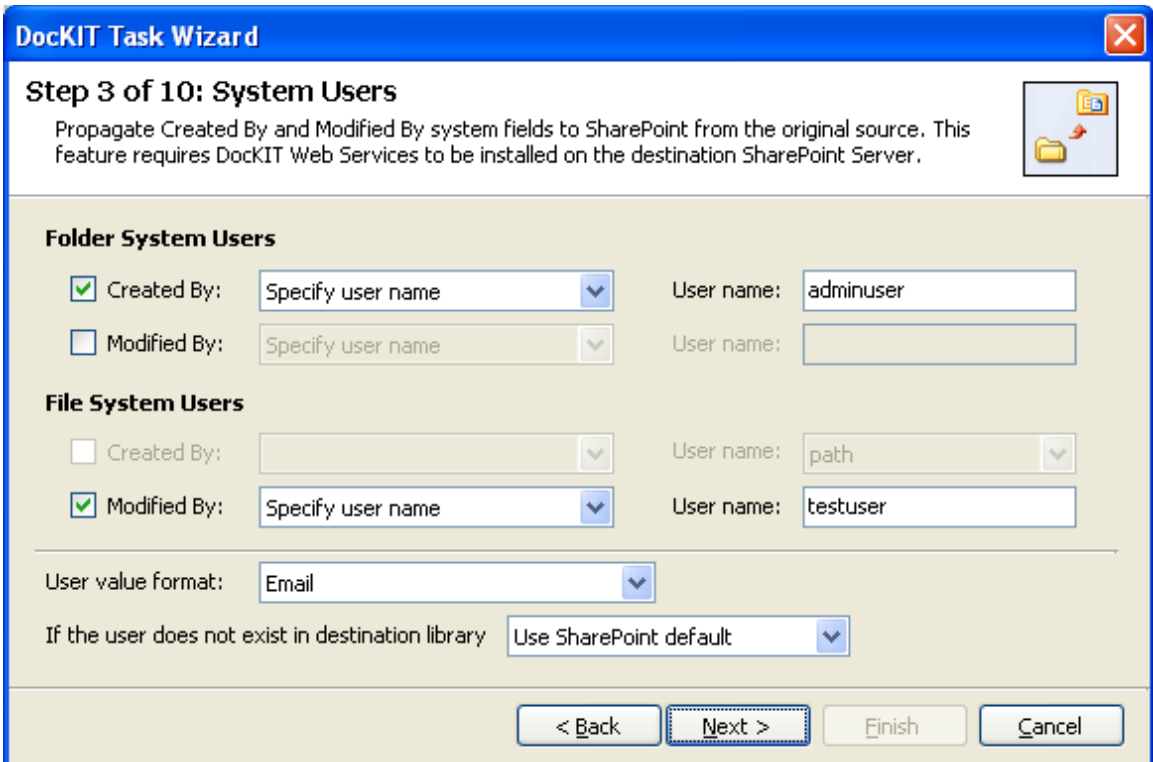


The user value can be the *Login Name* or *Display Name* or *E-Mail address* of the user. DockKIT will search the site users list and assign the ID of the matching the user to the People or Group column of the respective file, only if the user name exists. Do not use multiple values.

**Specify user** - The specified user value will be assigned to the respective user fields. Select the user value format from **User Value Format** options to search the User ID in the site users list for the specified user value. The default format of the user account is the user login name (DOMAIN\USER).

**Assign from metadata file** - The system users can also be assigned from the external metadata file by including the file system users column name in the metadata file. This option allows each file to have its own system users, so long as the stated user already exists in the SharePoint library. The user value format specified in Step 3: Metadata Options will be used to search the User ID in the site users list. If the metadata entry is not available, the current import user will be assigned automatically.

4. Specify the action to be taken, if the specified user does not exist in the destination library:
  - **Do not import file** - DockKIT will not import file if the user specified does not exist in the destination library.
  - **Use SharePoint default** - DockKIT will import file and system users will be the user account performing the import operation.

5. 



**Note:**

- Created By user will be assigned / updated for the new files only. In other words, Created By user will not be assigned or modified for an already existing file or a new file version.
- While re-importing partially imported files, Created By user value will not be re-assigned to the required value once the file is imported into the SharePoint library.
- You can re-assign the system users value for folder after it was created in SharePoint.

**9.1.4. [Content Type Settings](#)**

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**9.1.5. [Content Approval Status](#)**

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**9.1.6. [File Settings](#)**

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**9.1.7. [Import Conditions](#)**

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**9.1.8. [Document Status](#)**

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**9.1.9. [Task Settings](#)**

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**9.1.10. [Validate Task Settings](#)**

---

**9.2. [Create Metadata File](#)**

---

**9.3. [Edit task](#)**

---

**9.4. [Copy task](#)**

---

**9.5. [Delete task](#)**

---

**9.6. [Run task](#)**

---

**9.7. [Re-import task](#)**

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## **10) *Shrinking a SharePoint Content Database***

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DockKIT uses an advanced programming technique to ensure that the metadata values are updated correctly as per the task settings specified in the DockKIT Task Wizard. DockKIT uses this advanced technique to update the SharePoint column values in the following instances:

1. Updating partially selected File System Properties regardless of file format
2. Updating file content types
3. Re-importing error items in the selected task
4. Import Office documents with metadata given in the external metadata file

However, this new technique may use additional database disk space, which can be reclaimed later by using the Microsoft SQL Server Management Studio. Please refer to the following MSDN articles to reclaim database disk space in SQL Server:

Shrinking a Database : <http://msdn2.microsoft.com/en-us/library/ms189080.aspx>

How to: Shrink a Database (SQL Server Management Studio)  
<http://msdn2.microsoft.com/en-us/library/ms189035.aspx>

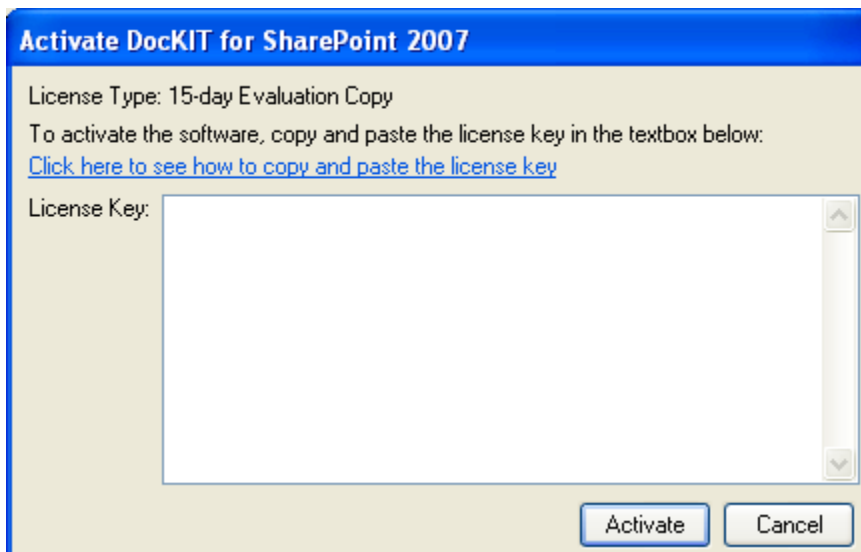
## I. How to register the software?

Once you purchase the software online or through any one of our resellers, you will receive a sale notification through e-mail from our sales department. We will send you an e-mail with the necessary instructions to activate the software.

In case you do not receive an e-mail from our sales team after you purchase the software, please send the following information to our sales department at [sales@vyapin.com](mailto:sales@vyapin.com) with the sales order number:

- **Company Name:** End-user Company Name
- **Location:** City & Country for the Company Name given above

Please allow 12 to 24 hours from the time of purchase for our sales department to process your orders.



**Image 1 - Activate screen**

Perform the following steps to activate the software:

1. Download evaluation/trial copy of software from the respective product page available in our website at <http://www.vyapin.com/>
2. Install the software on the desired computer.
3. You will receive a license key through e-mail as soon as the purchase process is complete.
4. Click 'Activate' in Help -> About -> Activate menu to see the Activate dialog (as shown in Image 1).
5. Copy the license key sent to you through email and paste it in the 'License Key' textbox.
6. For help on how to copy the license key, click 'Click here to see how to copy and paste the license key' link in the Activate dialog (as shown in Image 2).

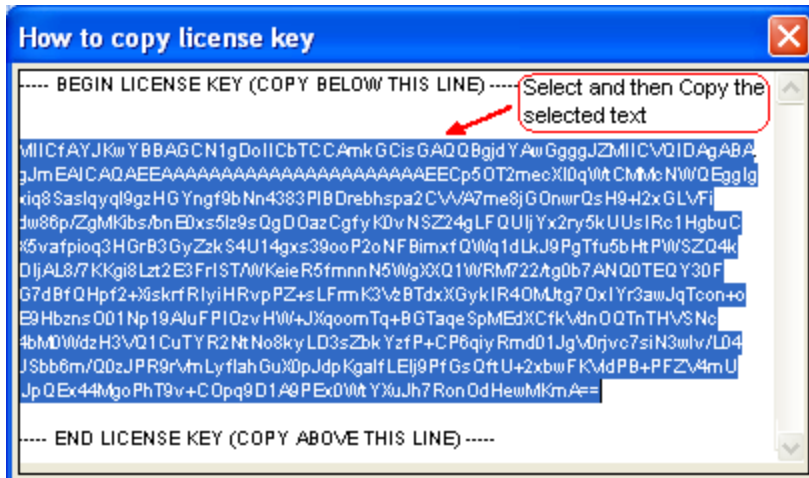


Image 2 - How to copy license key screen

## II. Troubleshooting

If and when a problem arises, please forward the following files to support@vyapin.com to get back to you with a solution. These files will be available where DockKIT is installed.

1. Error log file - e.g., C:\Program Files\DockKIT2007\Log\DockKITErrorLog.txt
2. For issues while running a task, the Activity Log and Error Log files will be generated in a date and time-stamp folder within the task folder name under TaskHistory folder.
  - a) *Activity log file* - e.g., C:\Program Files\DockKIT2007\TaskHistory\DockKIT Task\20060522-183919\logs\ActivityLog.txt
  - b) *Error log file* - e.g., C:\Program Files\DockKIT2007\TaskHistory\DockKIT Task\20060522-183919\logs\ActivityErrors.txt
  - c) *Metadata log file* - e.g., C:\Program Files\DockKIT2007\TaskHistory\DockKIT Task\20060522-183919\logs\MetadataErrors.txt
  - d) *DockKIT error log file* - e.g., C:\Program Files\DockKIT2007\TaskHistory\DockKIT Task\20060522-183919\logs\DockKITErrorLog.txt
  - e) *Move Activity log file* - e.g., C:\Program Files\DockKIT2007\TaskHistory\DockKIT Task\20060522-183919\logs\MoveActivityLog.txt
  - f) *Task settings file* - e.g., C:\Program Files\DockKIT2007\TaskHistory\DockKIT Task\20060522-

183919\settings\Details.xml

- g) *Library settings file* - e.g., C:\Program Files\DockIT2007\TaskHistory\DockIT Task\20060522-183919\settings\LibrarySettings.xml
- h) *Process details file* - e.g., C:\Program Files\DockIT2007\TaskHistory\DockIT Task\20060522-183919\settings\ListItemProcessCount.xml

### III. Technical support

Please send all Technical Support questions to [support@vyapin.com](mailto:support@vyapin.com).

Please send us the following additional information if you are reporting a problem:

- a. Version of DockIT that you are evaluating or you have registered with us. (Version information could be found in the "About" Screen and in "Help").
- b. Additional services or resource consuming processes/applications (like anti-virus) running in the background on DockIT installed machine as well as the source and destination MOSS/WSS.
- c. Hardware configuration of the machine where DockIT and MOSS/WSS is installed.
- d. 'Service Pack' version of Windows Server & MOSS/WSS running currently.
- e. Send us the "DockITErrorLog.txt" available in the installation path of DockIT (e.g., C:\Program Files\DockIT2007\Log\).
- f. While running a task, a set of files (ActivityLog.txt, ActivityErrors.txt, MetadataErrors.txt and DockITErrorLog.txt) will be generated under the respective task folder in History folder, available in the installation path of DockIT (e.g., C:\Program Files\DockIT2007\TaskHistory\<taskname>\<timestamp>).